

Focused on your future.

Are you a registered representative at a wirehouse firm? Do you have a high production quota and a low payout? Consider speaking with Coburn & Meredith, Inc., a third generation, family-owned investment firm established in 1934. We are a regional broker-dealer with multiple offices throughout New England. Our firm model is a broker-dealer-RIA hybrid.

Coburn & Meredith has a proven track record of assisting advisers with transitioning their business practices from the traditional, wirehouse model to a fully independent operation. Our management team promotes independent-thinking and -working professionals who have compliant, well-established businesses. Advisers at Coburn & Meredith are encouraged to create the type of practice most suitable to their clients and themselves. Our advisers manage their own books of business and maintain their client relationships. Significantly, our payouts are among the highest in the industry for a full-service firm.

Investment Adviser Representative

Coburn & Meredith, Inc. is seeking established, experienced investment adviser representatives for its Boston and Simsbury (CT) offices. Our minimum requirements are ten years of investment experience as a registered representative with an existing book of business. Applicants must also have an active FINRA Series 7 with a Series 66 license or a combination of the Series 63 and 65.

The benefits from partnering with Coburn & Meredith:

- Full-service investment management firm offering in-house operational, compliance, billing, and marketing support.
- Two business models to select from.
- No proprietary products.
- Onboarding team to help with your business transition.
- High production payout.
- Trained operations staff in each location.
- Experienced client service team able to handle asset movement and transactional requests.
- Entrepreneurial, independent work environment.
- Custodial relationships with Fidelity Investments and First Clearing.
- On-demand training and practice management consulting.
- Access to multiple research and reporting programs.
- Comprehensive suite of investment products and services.
- Full employee benefits offered.

Come see what it's like to work for a truly independent firm!

Advisers are encouraged to contact **Sean F. Flaherty**, Boston Branch Manager by phone at (617) 517-0431 or by email via sflaherty@coburnfinancial.com. All discussions are confidential.

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