KINNECT
ADVISORS

Pursue Your Future with Certainty

Kinnect Advisors is a collective ensemble built to breed collaboration within a supportive environment so advisors can thrive and build their business their way.

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Why Independent?

Transitioning to independent advising can seem like a lot, especially with your existing workload. So why go independent? Here are just a few of the reasons why you might want to make the shift:

Work Virtually or In-Person

Gain the freedom to design your day. You know when and where you work the best, our systems and processes can be leveraged to fit.

To Do Your Best Work

With so much competition and consumer demand, you need freedom to act in your client's best interests in order to truly compete and differentiate in the market.

Offer Conflict-Free Advice

Independence means only offering the products and services that will be the best fit for your clients, not pre-established solutions.

A Network Built to Support Growth

Join a network of support and a team-centered approach that ensures every advisor has a wealth of knowledge and experience behind them.

Advanced & Open Source Technology

Gain access to an abundant, non-proprietary, award-winning technology shelf with support and curation to implement what works best for your business and clients.

Serving Entrepreneurs

We work with innovative thinkers and go-getters. We bring advisors on who are hungry to grow and ready to dig in. Maybe you have a big book already, maybe you're still working on it. The one thing all Kinnect advisors have is an entrepreneurial mindset.

Sound Familiar?

"I want to build a business."

"I'm tired of working for someone else."

"I want to earn more of what I bring in."

"I'd like to be growing faster."

"I'm tired of doing this alone."

"I'm tired of being captive."

If You're an Advisor With An Entrepreneurial Mindset, Let's Talk.

Why Kinnect

A collective ensemble organization and structure means we're designing an environment where advisors flourish. It's fully supported, without top-down interference or containment.

Collaboration

Our evolving culture of collaboration is the catalyst for a robust network of knowledge that helps foster ideas and can help keep advice far from the echo chambers.

Process

Organization makes action possible. Our comprehensive processes provide the clarity that helps clients and advisors alike take action on their goals.

Independence

We're not limited to certain products or pre-determined solutions, giving us the flexibility to pursue what's best for clients in every circumstance.

Building A True Business

Our educational approach starts with advisors; we ensure everyone is exposed to different ideas so we can advise with confidence and decisiveness.

Fit for You. Fit for Us.

If you're interested in becoming an advisor at Kinnect, it's important for our firm to feel like a good fit for you; just as important as it is for us to feel like you're a good fit for us.

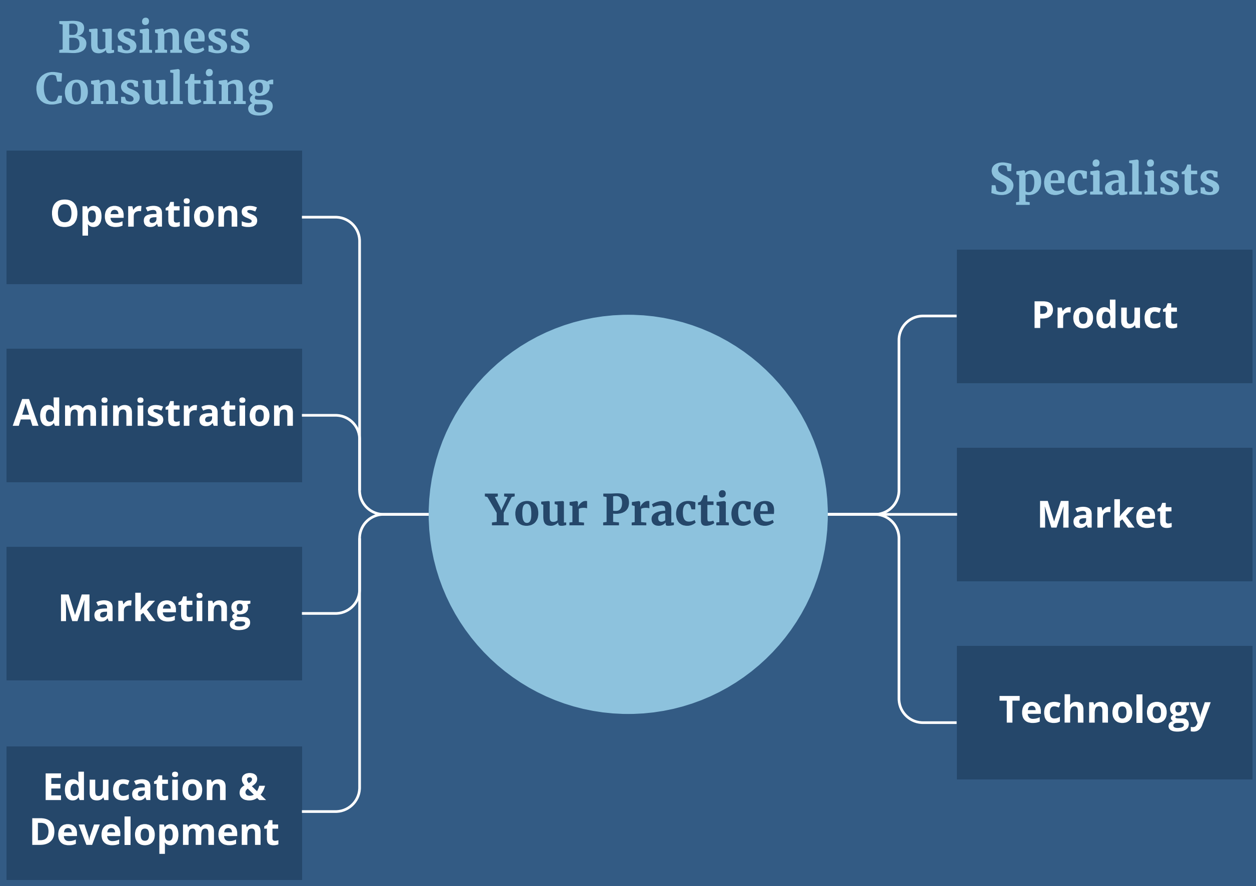
Do you think our firm is a good fit for you?

Meet the Team

At Kinnect, we believe in being greater than the sum of our parts: ours is a culture of collaboration. Get started by meeting the advisors you'll be working with!

Your New Org Chart

When we said independent, we didn't mean alone.
Here's your support.



What Makes Kinnect Different?

High-Level Business Development

Don't just train once: incorporate weekly and monthly development initiatives all year round.

One-of-A-Kind Concierge Services

We're your one-stop solution for all your client application and administrative needs.

Unlock Your Valuation

We provide a structured framework with everything from coaching to check-ins so you get the best valuation for your business when the time comes.

Marketing Services

Everyone wants to do marketing, but no one has the time. We provide an innovative organized system with structured, in-house support and execution.

High-Level Business Development

Our training and development services help ensure your practice continues to grow into a long-term asset you can exit when the time comes. This is more than a one-time training program; we incorporate weekly and monthly development initiatives into our practice all year round.

Curated, Leading-Edge Technology & Tools

- Go beyond the limited wirehouse options to access a massive tech shelf at your disposal
- Individualized selection & coaching based on your unique business and goals

Structured Discussions On What Works & What Doesn't

- Meet-ups on systems and processes, products, technology challenges & ways to win with clients
- Programmed weekly agendas to learn from various advisors and operations team members

Hand-Picked Development Webinar Lists

- We scour 300+ email invitations per week to bring you the top five worth your consideration

Kinnected Newsletter Surfaces What's Actionable & Relevant

- Gain back time spent reading countless emails
- Get an aggregated look at reminders, events, & news every Thursday

One-of-A-Kind Concierge Services

We want you in front of your clients. We don't want you doing anything else. Our concierge services handle everything from preparing forms to behind-the-scenes operations including marketing, mail, compliance, processing and more.

Here's What We Take Care of For You

Prepare Application Forms
B/D Suitability Forms
Annuities
Brokerage
Sponsor Applications
Electronic Signature
Term Life
Behind the Scenes
Client Outreach
Investment Advisory – Core and Third Party/TAMPS
Tracking & Notification
Risk Applications
Paper Requests
Permanent Life
Disability Income
Asset Movement Forms
Best Interest Analysis
Client File Updates

Imagine Being Able to Only Focus On Clients

You won't find advisor support like this anywhere else. Concierge services includes the following and more.

- Full Client Interaction
- Schedule Appointments w/ Current and Onboarding Clients
- Account Servicing - Client Outreach/Coordination
- Social Media Management
- Full Mailing/Paper Request Processing
- Mail from Office (costs paid by firm)
- Branded Gifts for Clients
- Logged for Compliance
- Client Appreciation Event, Annual

Unlock Your Valuation

Grow your business and become a true CEO. Organization is vital to future success, so we provide a structured framework for leaders, incorporating everything from coaching to accountability check-ins. We're helping you to build your business into the type of valuation you desire when it comes time to transition and exit.

Optimize & Support Your Business Processes

The everyday processes and procedures of running a business can be difficult to balance with your workload: we can help you strike a balance.

- Business Submission
- Central File Maintenance
- Split Code Creation
- Advisor Change Requests
- Reminder/Instructional Emails

Planning Toward the Achievement of Your Business Goals

Here we'll evaluate where your business is now, as well as where you want it to be. Then we'll create a plan to get you there.

- Business Plan Development
- Practice Evaluation
- Goal Tracking
- Specialized Resources

Coaching & Guidance to Each Milestone

These monthly meetings serve as accountability check-ins, ensuring all of our advisors and partners are staying on track to reach their goals.

- Reminders of regular compliance tasks/duties
- Review of active client files for best practices
- Avoid potential unknown cumulative liability

Marketing Services

What would 25 qualified appointments mean for your year? We're quick to bring in new programs and proven processes to help advisors to grow their book. From innovative platforms to do-it-for-you strategies, we help advisors to Kinnect with their audience, elevate their brand, and present the cutting-edge digital presence you need to grow and win today.

Mining Your Book

We meticulously analyze your client base, identifying potential within your book of business. Delving into the details can help you discover untapped potential and gain actionable insights to fuel strategic decision-making.

Monthly Seminars

Share our monthly seminars with your clients and prospects to get them in on discussions about relevant financial topics. Get your clients thinking about their financial literacy and reinforce your dedication to their financial success.

Opt-In Client Emails

A targeted email drip marketing strategy delivers carefully crafted emails right to your clients' inboxes without you having to type a thing. This opt-in approach gives consenting clients access to industry insights and updates.

Kinnect Leads

Kinnect Leads is an exclusive opportunity for Kinnect Advisors to expand their client base through unassigned firm clients. Tap into a pool of potential clients who may be seeking meaningful financial guidance.

MarketingCentral: Kinnect More While Doing Less

Bring professionally curated, pre-approved content into your marketing strategy. MarketingCentral gives advisors tools to seamlessly engage, prospect, and recruit across multiple channels.

Everyone Promises, We Deliver

Everyone boasts the same benefits, we truly Kinnect advisors through proven-processes and thoughtful planning that makes them a reality.

Access to Leadership

Our experienced leaders get to know your intentions, desires and unique needs for your practice, then provide ongoing practice management support in pursuit of your personal and business goals.

Tools & Tech for Efficiency

Reduce the complexity of your workflow and supercharge your client relationships with platforms that can help you stay competitive in an evolving marketplace.

Compounding Client Acquisition

We deliver high-intent, qualified local leads directly to you, while optimizing your marketing strategies for maximum effectiveness. Customize our solution to your specific business goals, selecting desired asset tiers, geographic target areas, and monthly budgets.

Practice Management

Through comprehensive practice development support, including Concierge-level services, we offer the tools you need to help grow your career and build a strong, independent brand identity.

Onboarding & Transition Support

Simplify your operations with our integrated support package. From HR assistance to back-office tasks, our dedicated team ensures seamless operations, helping you build strong client relationships from day one.

Advisor Process To Partnering

At Kinnect, we understand that finding the right fit is crucial for both advisors and the firm, so we have designed our process to be collaborative, transparent, and mutually beneficial. From the initial introduction to establishing a comprehensive partnering plan, we prioritize open communication and personalized attention to ensure that each advisor's unique goals and aspirations are fully understood and addressed. Whether you're an experienced advisor looking to take your practice to the next level, an established team or firm that is looking to build efficiency into your business, or even a newcomer eager to build your career in finance- Kinnect Advisors provides the resources, guidance, and opportunities you need to succeed.

Overview of Partnering Process:

1

Kinnect Introduction: Meet the Managing Partner

- **Overview:** At Kinnect, we provide personalized guidance and consultation to financial advisors, financial planners, investment advisors, and their teams.
    - **Support & Structure:** We offer comprehensive support at every stage & aspect of your practice/ business. Our team of experts collaborates to deliver customized solutions accelerate business growth

2

Kinnect Economic Package:

- **Transition Assistance:** Financial assistance for joining Kinnect.
- **Subsidy & Bonus Packages:** Competitive incentives for performance.
- **Business Valuation:** Expert evaluation of your practice's value.
- **Marketing Dollars:** Our monetary investment in your marketing initiatives
- **Production Documents:** What Kinnect will need to create an economical offer.

3

Kinnect Showcase:

- **Meet Your Support Team:** Personalized introduction to our team of experts who will aid in your success.
- **Role & Responsibility:** Explanation of how our associates play a key role in your success.
- **Expectations:** Clear outline of what and how you can count on us for support.

4

Kinnect Partnering Plan:

- **Offer Review:** Tailored offers aligned with your specific goals and needs.
- **Differentiation:** Explanation of our unique value proposition and how it sets us apart.
- **Plan Review:** Personalized plan development crafted for your success.
- **Expectations:** Clear communication of partnership expectations to ensure a mutual understanding.

Ready to Pursue Your Future with A Partner?

It’s Time to Kinnect

kinnectadvisors.com

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