

GALLACHER

ADVISOR PLATFORM

SERVICES OFFERED THROUGH GALLACHER CAPITAL MANAGEMENT
A REGISTERED INVESTMENT ADVISOR

**EMPOWERING ADVISORS THROUGH
AN INNOVATIVE PLATFORM OFFERING
PAYOUTS UP TO 100%**

ADMINISTRATIVE |

BACK OFFICE AND TECHNOLOGY

COMPLIANCE |

OVERSIGHT AND SUPPORT

INVESTMENT MANAGEMENT |

CUSTOMIZABLE, IN-HOUSE, DIRECT TO CLIENT

AMPLIFY

YOUR

GROWTH

**TIME |
YOUR NEWEST ALLY**

In response to increasing demands for services, advisors are stretched thin to meet expectations. The Gallacher platform enables advisors to:

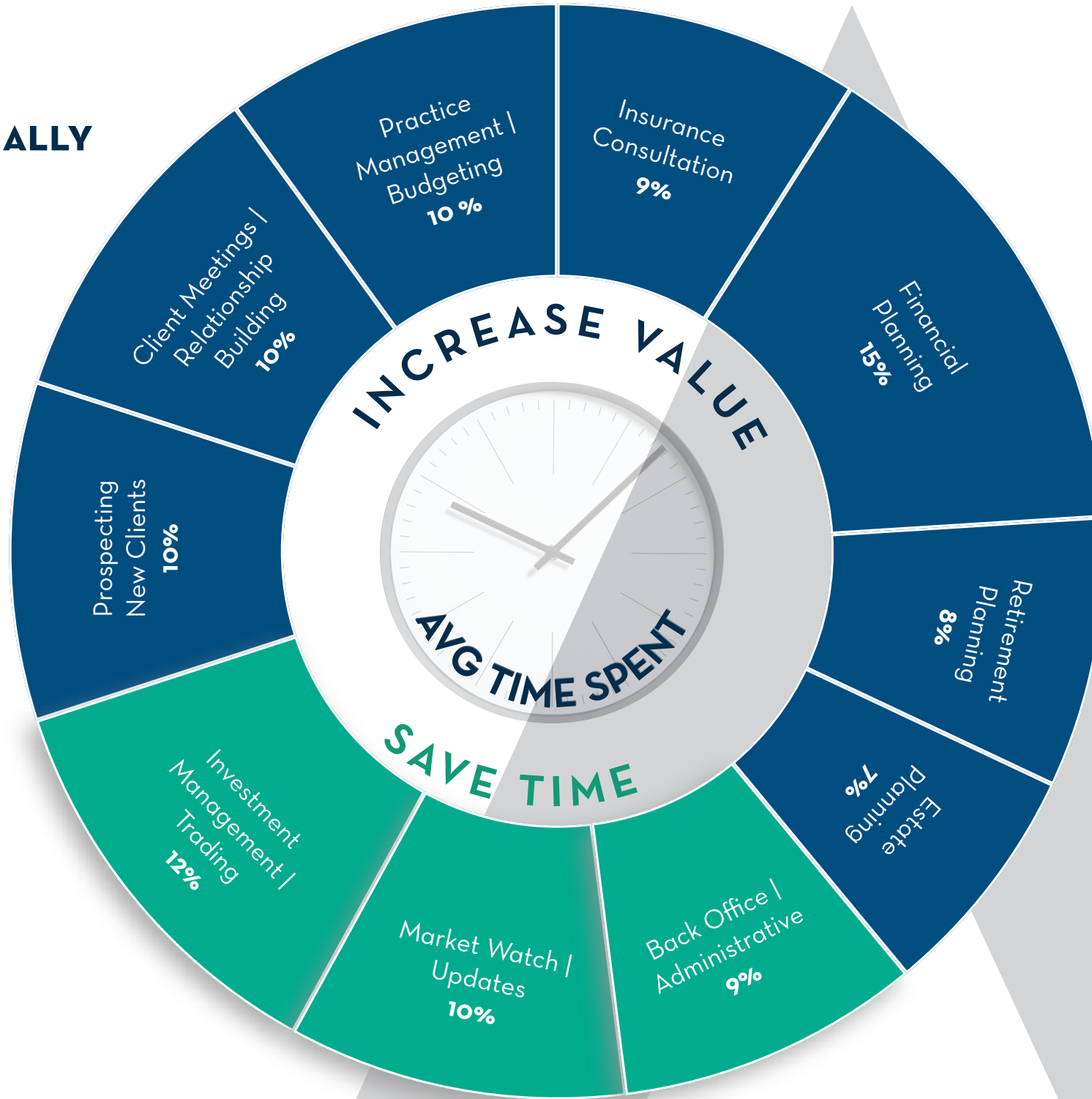
**RECEIVE SUPPORT
IN ALL DAY-TO-DAY
SERVICES**

**OFFLOAD INVESTMENT
MANAGEMENT
AND BACK OFFICE
RESPONSIBILITIES**

**BE INDEPENDENT,
FOCUS ON GROWTH &
SERVICE**

**HARD WORK
ADVANCED SKILLS
A DRIVE TO BUILD A BETTER
FUTURE FOR YOUR BUSINESS**

Whatever it is that has brought you here, our unique advisory platform will help you enjoy the fruits of your labor for many years to come. Create a comprehensive succession plan that works for you.



UP TO

100% PAYOUT

Advisors who participate in the platform will pass back-office responsibilities to Gallacher Capital Management (including trading, investment management, compliance, etc.) and be freed up to better serve their advisory clients and pursue asset gathering opportunities.

As the direct investment manager of the assets, Gallacher can offer advisors up to 100% payouts on their advisory fees.

**ADVISOR
WIN** | **WIN
CLIENT**

PROVIDE VALUE
 FULL TRANSPARENCY • MORE FOCUSED CLIENT SERVICE • OPTIMIZED ASSET MANAGEMENT • PERSONAL CUSTOMIZATION • TAX EFFICIENCIES

OUR TEAM | YOUR VALUE

ADD MORE ARROWS TO YOUR QUIVER

GALLACHER CAPITAL WILL GIVE YOU THE TOOLS AND GUIDANCE TO MOVE YOU TOWARD YOUR FUTURE GOALS WITH CONFIDENCE

	Services	Gallacher	Traditional TAMP	Adviser Powered
Investment & Research	Turnkey Asset Allocation Models	✓	✓	✓
	Custom Indexing	✓	✓	✓
	Custom Portfolio Builds	✓		
	Custom Research Mandates	✓		
	Curated, Vetted Money Manager Selection	✓	✓	
	Alternatives Platform	✓		
	Vetting of One-Off Investment Opportunities	✓		
	IPS Consulting	✓		
	Model Delivery Trade Instruction to Advisor			
Trading	Model Level Trading & Rebalance	✓	✓	✓
	Full Service Trading Desk & Operations	✓		
	Tax Optimization Overlay	✓	✓	
	Tax-loss Harvesting	✓		
	Cashiering	✓		
	Hedging	✓		
Client Facing	Point of Sale Assistance	✓	✓	
	Event Support and Speakers	✓	✓	
	Licensed Advisors & Managers to Help Secure & Service Clients	✓		
	Joint Client-Facing (White Label) Market Calls	✓		
	Client Portal	✓		
Case Prep	Large Account Case Prep	✓	✓	✓
	Planning	✓	✓	✓
	Client Portfolio Diagnostic & Risk Intelligence	✓	✓	
	Custom Portfolio Construction	✓	✓	
	Marketing Campaigns	✓		
	Prospect - Client Pipeline	✓		
	Prospect Portfolio Proposal	✓		
Back Office	Tech Package & Dashboard	✓		
	Direct Technology Support	✓		
	Custom Reporting	✓		
	Business Intelligence, Data Aggregation/Feeds, & Analysis	✓		
	Accounting	✓		
	Fee Billing	✓		
	Automated Workflows	✓		
	Administration & Paperwork	✓		
	Compliance Consulting & Support	✓		
Education	General Investment Training	✓	✓	✓
	Firm-level Investment Training	✓	✓	
	CE Programs	✓		
	Off-Site Focus Groups and Boot-Camps	✓		
	Firm-Focused Practice Dev Consulting	✓		

