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Are You Leaving Sales on  
the Table Because You  
**Don't Have All  
the Licenses?**

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## The OnPointe Advantage!

- Expertise in the transition process.
- Back office support you can rely on.
- Competitive payouts.
- Practice management and sales tools.
- Access to a wide range of investment options.
- One application, one system/ software interface.

For more information, contact  
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**Pointing You Toward  
Financial Freedom<sup>SM</sup>**

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## Are Your Clients Looking for More Options Than You Can Offer?

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If you're currently selling only insurance products and aren't affiliated with a Registered Investment Advisory or Broker-Dealer, your options are limited in what guidance you can offer clients.

- There is surge of people who are retiring and in need of an income plan, and your competition—banks, wire houses, Broker-Dealers—is gearing up to meet the demand.
- Consumers are looking for advisors who can create a *complete* income plan and then implement and monitor that plan.
- We can expect more regulation in the fixed insurance marketplace, not less! Source of funds and suitability—hot regulatory topics—limit your activities and amount of assets that can be placed in fixed insurance products.

### What does this mean for you?

Unless you can expand your product offerings today, you're limited in what you can advise your clients and may be losing potential future customers.

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## Would You Like To Turn Part of Your Business Into a Steady Income Stream?

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## Expand Your Business by Becoming an IAR

Insurance products can meet a variety—but not all—of your clients' financial needs. Becoming an Investment Advisor Representative (IAR) allows you to:

- Access a multitude of investment options that can meet your clients' financial objectives.
- Reposition your clients' investments as their circumstances change.
- Be perceived as more professional.
- Fulfill more of your clients' needs than ever before—so they don't have to go elsewhere!

But setting up your own Registered Investment Advisory can be overwhelming, requiring significant industry knowledge and time and attention to details, not to mention the upfront cost to get registered and purchase technology to support your business. You need to set up the required books, records, procedures, and approved marketing materials and provide required training for your Chief Compliance Officer and affiliated investment advisor representatives. Then comes your first onsite audit with a securities regulator!

## With OnPointe, You Don't Have To Go It Alone

OnPointe—Legacy Marketing Group®'s affiliated RIA—is there to walk you through the process and provide you with the resources you need to do what you do best—sell!

You'll enjoy:

- Back office support of running an RIA—minimizing the hassle of transitioning to a new business model.
- Competitive payouts and practice management and sales tools.
- Ability to earn commissions for insurance sales while transitioning and expanding your business model.
- Access to a wide range of investment options for your clients.
- Ease of one application and one system/software interface.
- Ability to provide clients with a well-designed plan that offers guarantees, liquidity, and helps their income keep up with inflation—complete plans lead to larger sales!

Instead of depending on an insurance company to process your commission check, building assets under management with OnPointe can provide you with a quarterly income stream for life or with a valuable asset that can be sold as part of your succession plan when you're ready to retire.

## Your future is in your hands!

Call us today to take advantage of this opportunity to expand your business and help your clients.

**800-395-0045**

Registration as an investment advisor does not constitute an endorsement of the firm by securities regulators nor does it indicate that the advisor has attained a particular level of skill or ability.