

Financial Institutions Profiles Series

Fiduciary Network:
Making Long-Term Passive Investments in Fee-Only Financial Advisors

(Table of Contents)



October 8, 2013

TABLE OF CONTENTS

History.....

- Initial Acquisitions Phase.....
- Follow-On Acquisitions Phase.....
- Maturation Phase.....

Statistics.....

- Offices.....
- Employees.....
- Accounts.....
- Assets Under Management.....
- Revenues.....
- Net Profits.....

Businesses.....

- Adviser Investments.....
 - Statistics.....
 - Employees.....
 - Clients.....
 - Accounts.....
 - Assets Under Management.....
 - Revenues.....
 - Net Profits.....
 - Services.....
- Brightworth.....
 - Statistics.....
 - Offices.....
 - Employees.....
 - Clients.....
 - Accounts.....
 - Assets Under Management.....
 - Revenues.....
 - Net Profits.....
 - Services.....
- Brouwer & Janachowski.....
 - Statistics.....
 - Employees.....
 - Clients.....
 - Accounts.....
 - Assets Under Management.....
 - Revenues.....
 - Net Profits.....
 - Services.....
 - Asset Allocation & Estate Planning.....
 - Mutual Fund Selection.....
 - Portfolio Management.....
- Evensky & Katz.....
 - Statistics.....
 - Employees.....
 - Clients.....
 - Accounts.....

	Assets Under Management.....
	Revenues
	Net Profits.....
	Services
Gibson Capital.....	
	Statistics
	Employees.....
	Clients.....
	Accounts.....
	Assets Under Management.....
	Revenues
	Net Profits.....
	Services
Keats, Connelly, & Associates.....	
	Statistics
	Employees.....
	Clients.....
	Accounts.....
	Assets Under Management.....
	Revenues
	Net Profits.....
	Services
Legacy Wealth Management.....	
	Statistics
	Employees.....
	Clients.....
	Accounts.....
	Assets Under Management.....
	Revenues
	Net Profits.....
	Services
Regent Atlantic Capital.....	
	Statistics
	Employees.....
	Clients.....
	Accounts.....
	Assets Under Management.....
	Revenues
	Net Profits.....
	Services
	Financial Planning.....
	Investment Management.....
Sand Hill Advisors.....	
	Statistics
	Employees.....
	Clients.....
	Accounts.....
	Assets Under Management.....
	Revenues
	Pre-Tax Income
	Services

- Traditional Wealth Management
- Transitional Wealth Management.....
- Women’s Wealth Network.....
- Foundations & Endowments
- Soltis Investment Advisors.....
- Statistics
- Employees.....
- Clients.....
- Accounts.....
- Assets Under Management.....
- Revenues
- Pre-Tax Income
- Services
- Organization & Ownership.....
- Organizational Structure.....
- Organizational Chart
- Board of Directors
- Ownership.....
- Privately Owned.....