



TIBURON STRATEGIC ADVISORS

Strategy Consultants to Financial Institutions

Financial Advisor Profiles Series

Third-Party Administrator Profiles:
Learning Best Practices by Profiling Leading Firms

(Table of Contents)



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TABLE OF CONTENTS

Financial Advisor Profiles Conclusions

Five Best Practices Define Leading Financial Advisor Firms
 Determine Clear Target Markets.....
 Choose Product & Service Offers to Support Chosen Target Markets
 Develop Appropriate Sales & Marketing Methodologies
 Build Necessary People & Technology Support Infrastructure
 Define Business Goals & Develop Written Plans
Fee-Based Financial Advisor & Independent Broker/Dealer Reps Best Positioned for
Success
 Fee-Based Financial Advisors
 Independent Broker/Dealer Reps.....

Benchmarking Categories View

Target Markets
Products & Services
Sales & Marketing
Human Capital
Technology

Profiles of Leading Third Party Administrator Profiles

Benefit Consultants
Capital Investment Advisory
Clark Consulting.....
CPI Qualified Plan Consultants
Daily Access
EBS Benefit Solutions
Geller Group
IIE
Ingham Retirement Group.....
McCready & Keene
NPS
Nyhart
Pension Source.....
Pension Specialists
Pollock Financial Group
Professional Capital Services
Retirement Horizons
Sentinell Benefits
SHDR.....
Stanley Benefit Services
Trautmann Maher.....
Web 401K