

Ficomm Partners

**Marketing Strategy, Strategic
Marketing Execution, and
Advisor Coaching for Advisory
Firms & Wealth Management
Enterprises**

Tiburon Written Research
July 16, 2026



TIBURON STRATEGIC ADVISORS

Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (& WealthTech) Firms

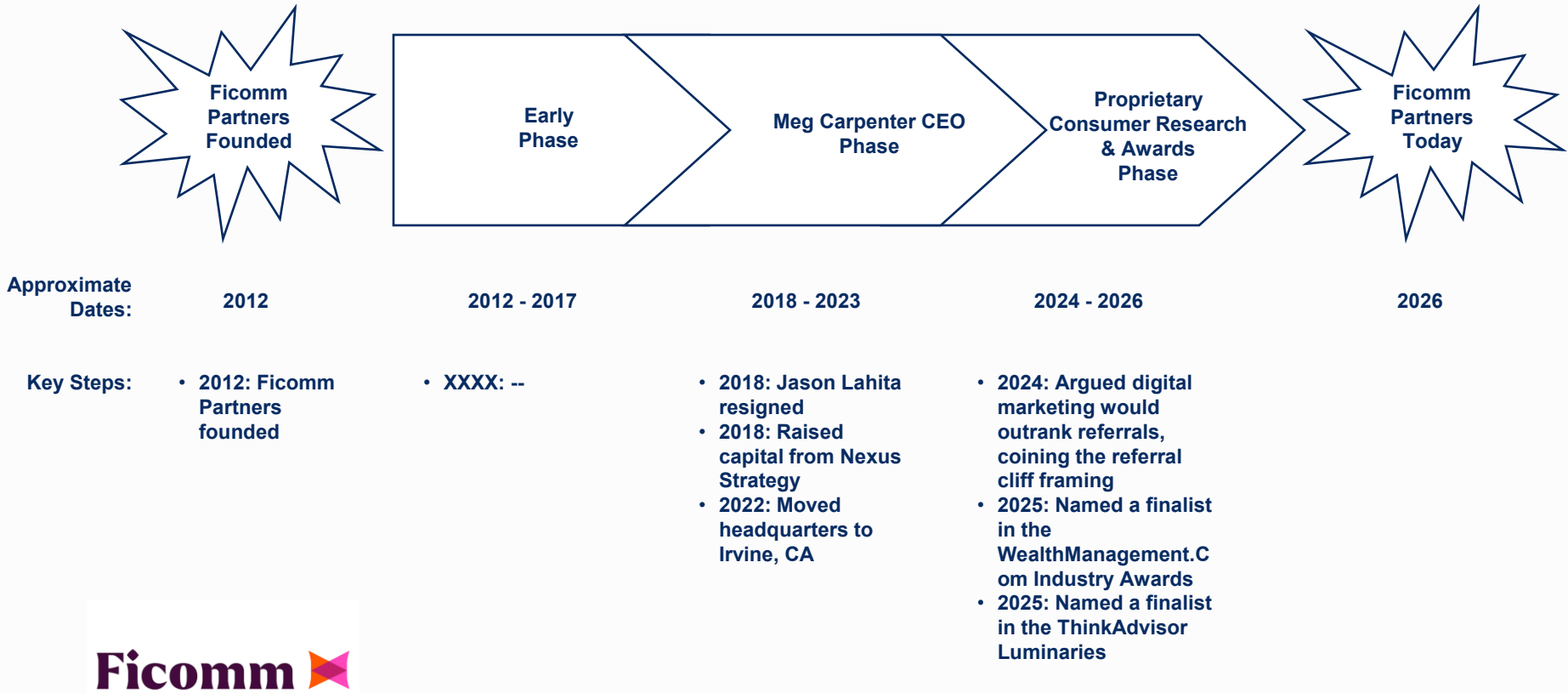


Comments

- **Founded in 2012**
 - **Founded by Meg Carpenter & Jason Lahita**
- **Based in Irvine, CA**
- **2 office**
- **21 employees**
- **250 financial advisor clients**
- **CEO: Meg Carpenter**
- **Privately owned**
- **Website: www.ficommpartners.com**

Ficomm Partners was Founded in 2012 and Has Subsequently Evolved through its Early, Meg Carpenter CEO, & Proprietary Consumer Research & Awards Phases

**Ficomm Partners
History**



Source: 7/10/26 Google Gemini Search Results; 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners was Founded by Meg Carpenter and Jason Lahita in 2012

August 2012

Comments

- **Founded in 2012**
 - **Founded by Meg Carpenter & Jason Lahita**
- **Based in Los Angeles, CA**
- **Managing Partners: Meg Carpenter & Jason Lahita**
- **Privately Owned**
- **Website: www.ficommpartners.com**

Ficomm 

Ficomm Partners Raised Capital From Nexus Strategy in 2018



Comments

- --

Source: 7/9/26 Google Gemini Search Results; 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Moved its Headquarters From Los Angeles, CA to Irvine, CA in 2022



Comments

- --

Ficomm Partners Argued Digital Marketing Would Outrank Referrals Within Five-To-Ten Years, Coining Referral Cliff Framing in its Consumer Insights Study in 2024



Comments

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Source: 7/9/26 Google Gemini Search Results; 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Has Won Many Awards, Starting with Being Named a Finalist For the WealthManagement.Com Industry Awards in 2025

**Ficomm Partners
Awards & Recognition**

WealthManagement.Com	ThinkAdvisor	XXX	XXX
• 2025: Named WealthManagement.Com Industry Awards finalist	• 2025: Named ThinkAdvisor Luminaries finalist	• XXX	• XXX 

Source: 7/9/26 Google Gemini Search Results; 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners is Not a Frequent Advertiser

Advertising

Comments

-



Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis



Comments

• --

Ficomm Partners Has a Website with Five Core Sections, Including Who We Are, What We Do, Our Insights, Search, & Work With Us

Ficomm Partners Website



Ficomm Partners is Not a Frequent Acquirer



Comments	
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Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Has a Charitable Giving Program

Charitable
Giving

Comments

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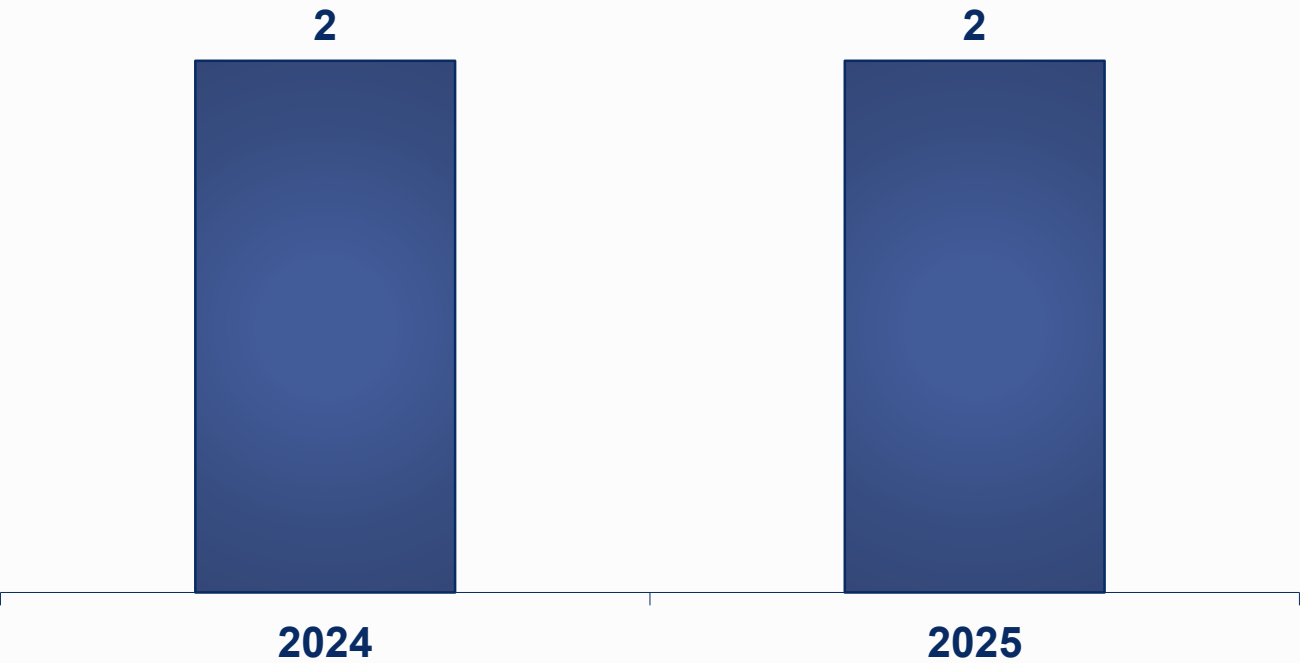


Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Has Two Offices, Consistent Since 2024



**Ficomm Partners
Offices**

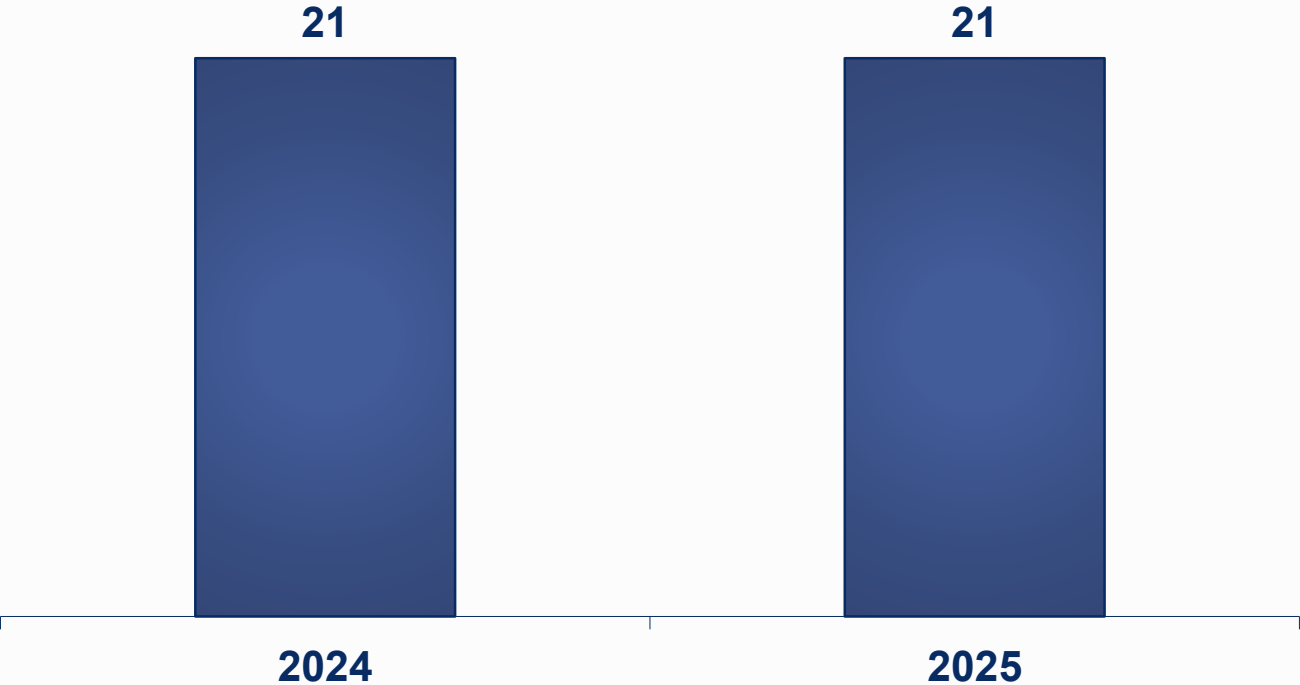


Source: 7/9/26 Google Gemini Search Results; 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Has 21 Employees, Consistent Since 2024



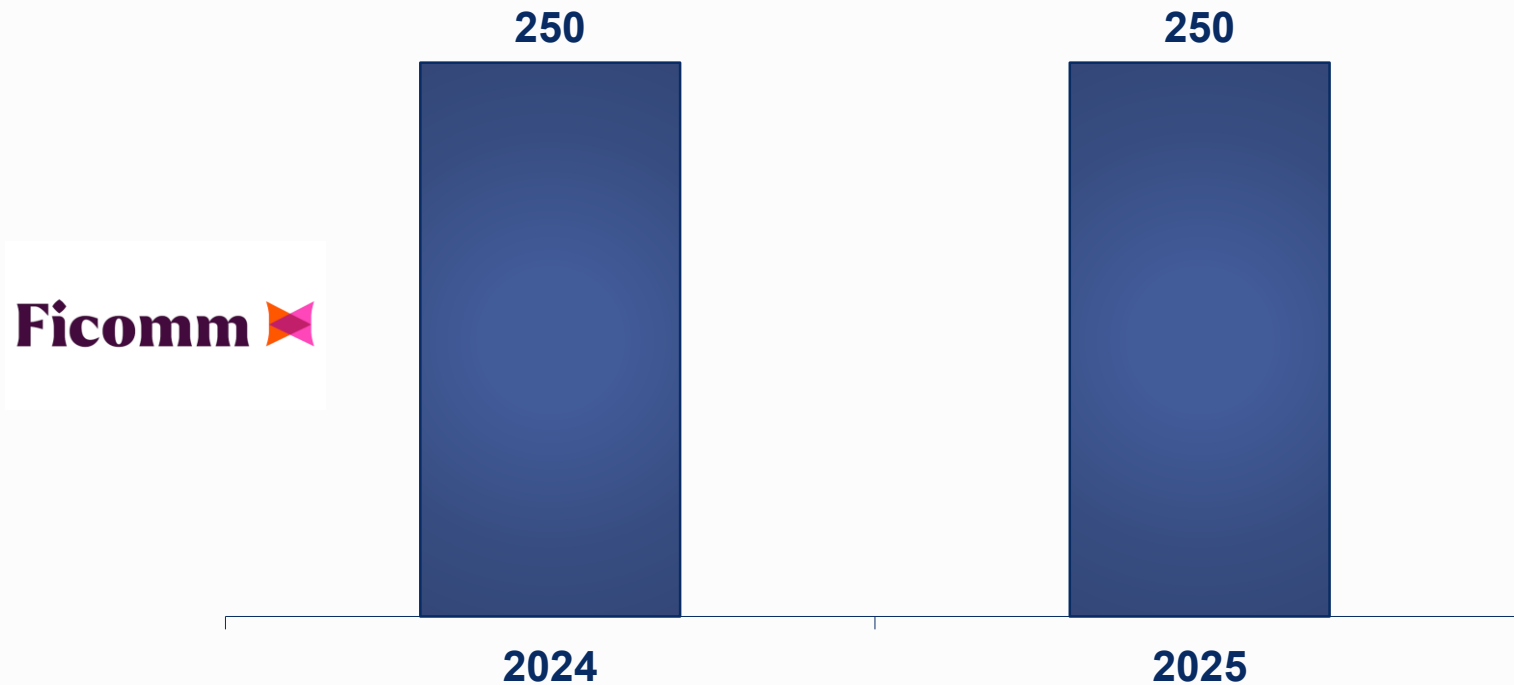
**Ficomm Partners
Employees**



Source: 7/9/26 Google Gemini Search Results; 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Serves 250 Financial Advisor Clients, Consistent Since 2024

Ficomm Partners Financial Advisor Clients



Source: 7/9/26 Ficomm Partners Website; 10/25/24 Ficomm Partners Presentation (Carpenter); Tiburon Research & Analysis

Ficomm Partner's Financial Advisor Clients Include ...

Ficomm Partners Financial Advisor Clients

**Fee-based financial
advisors (RIAs),
investment
management firms,
custodians,
broker/dealers, and
WealthTech firms**

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Ficomm Partners Have Gathered \$XXX Million Assets Under Management & Administration, Up/Down From \$XXX in 2024

Needs data

Ficomm Partners Financial Advisor Clients Assets Under Management & Administration (\$ Millions)

Ficomm 

2024

2025

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners has Financial Advisor Client Projects

Needs data

**Ficomm Partners
Financial Advisor Client Projects**



2024 **2025**

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Generates Revenues

Needs data

Ficomm Partners Revenues (\$ Millions)



2024 2025

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Earns \$___ Million Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA)

Needs data

Ficomm Partners Earnings Before Interest, Taxes, Depreciation, & Amortization (EBITDA) (\$ Millions)

Ficomm 

2024

2025

Ficomm Partners Earns \$____ Million

Needs data

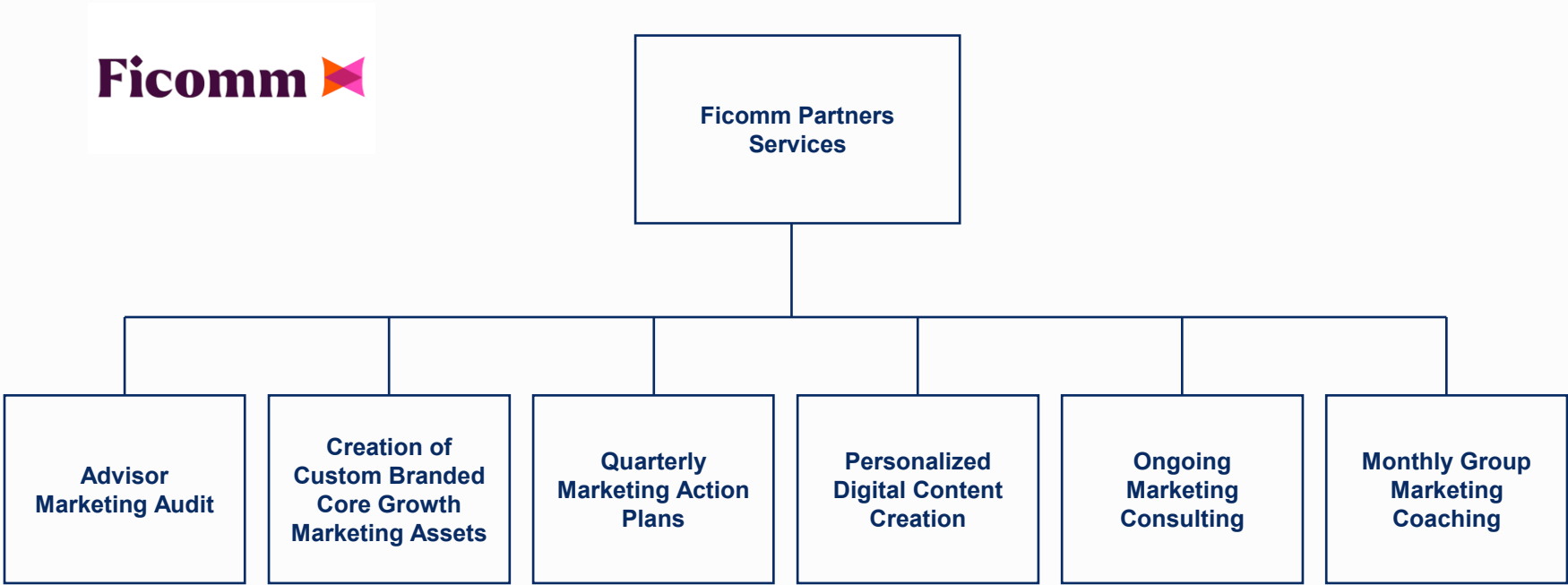
**Ficomm Partners
Net Profits
(\$ Millions)**



2024 **2025**

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Services



Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners First Service is its Advisor Marketing Audit

Advisor
Marketing Audit

Comments

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Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Second Service is its Creation of Custom Branded Core Growth Marketing Assets

Creation of
Custom Branded
Core Growth
Marketing
Assets

Comments

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Ficomm 

Ficomm Partners Third Service is its Quarterly Marketing Action Plans

Quarterly
Marketing
Action Plans

Comments

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Ficomm 

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Fourth Service is its Personalized Digital Content Creation

Personalized
Digital Content
Creation

Comments

- --



Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Fifth Service is its Personalized Digital Content Creation

Personalized
Digital Content
Creation

Comments

- --



Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Sixth Service is its Monthly Group Marketing Coaching

Monthly Group
Marketing
Coaching

Comments

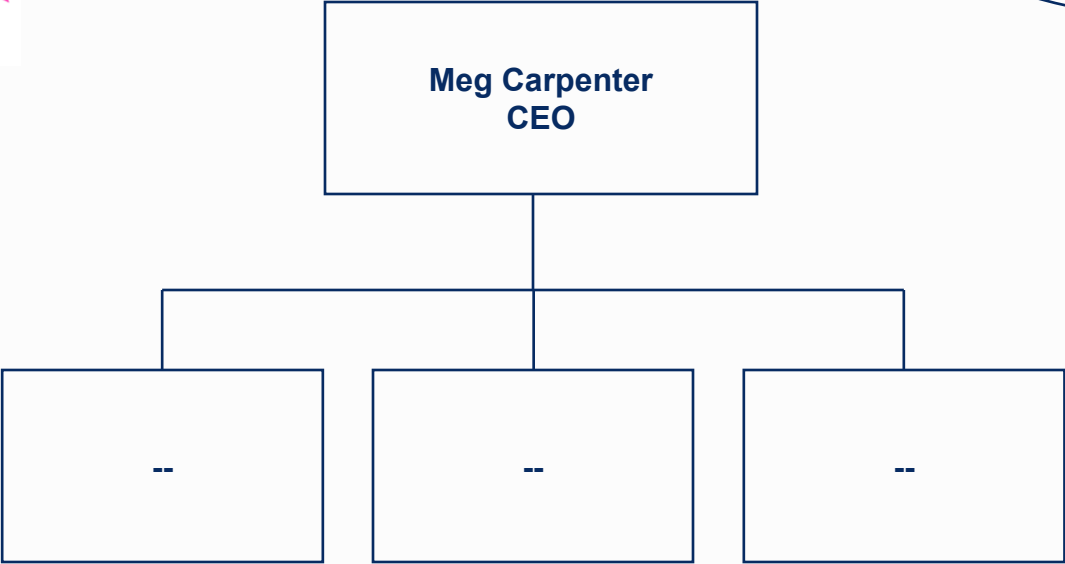
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Ficomm 

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners is Led by its CEO Meg Carpenter

Ficomm Partners Organizational Chart



Other Executives: Camille Birk (Vice President, Operations) Jess Landy (Vice President & Senior Strategic Lead); Jill Schofield (Vice President & Strategic Public Relations); Kelsey Woodbridge (Vice President, Public Relations); Christina Hugentobler (Senior Client Success Lead); Dan Pelberg (Senior Strategic Content Lead); Kristen George (Senior Executive Assistant)

Note: Meg Carpenter co-founded the firm in 2012; she was previously at John Hancock Financial
Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Has a Board of Directors Led by its Chairman...

**Ficomm Partners
Board of Directors**

-- (Chairman)	--	--	--	--
• --	• --	• --	• --	• -- Ficomm 

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis



Comments

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Needs data

**Ficomm Partners
Assets
(\$ Millions)**



2024 **2025**

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Has Liabilities

Needs data

**Ficomm Partners
Liabilities
(\$ Millions)**



2024 2025

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Has Shareholders' Equity

Needs data

**Ficomm Partners
Shareholders Equity
(\$ Millions)**



2024 2025

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Earns ... Per Share

Needs data

**Ficomm Partners
Earnings Per Share**



2024 2025

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Declares ... Dividends Per Share

Needs data

**Ficomm Partners
Dividends Per Share**



2024 2025

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Has a ... Dividend Yield

Needs data

**Ficomm Partners
Dividend Yield**



2024 2025

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partner's Stock Price is ...

Needs data

**Ficomm Partners
Stock Price**



2024 2025

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Has ... Shares Outstanding

Needs data

**Ficomm Partners
Shares Outstanding**



2024 2025

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partner's Market Capitalization is ...

Needs data

**Ficomm Partners
Market Capitalization
(\$ Millions)**



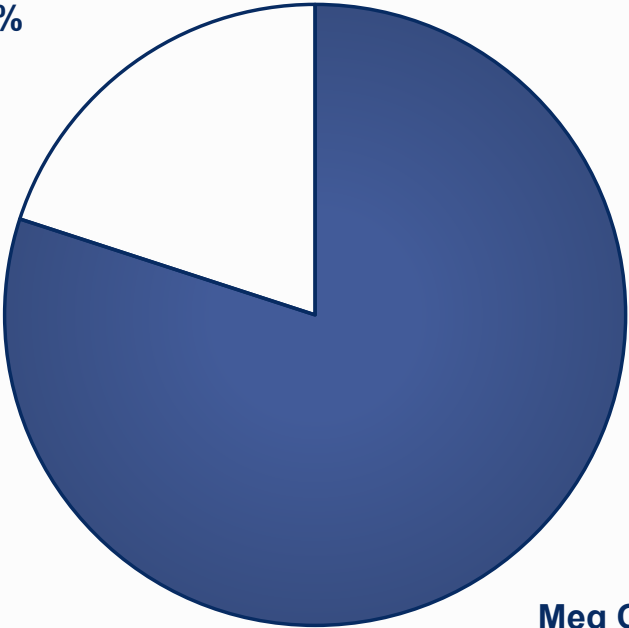
2024 2025

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners is Owned by Meg Carpenter and Nexus Strategy

Ficomm Partners Ownership By Owner

**Nexus Strategy
20%**



**Meg Carpenter
80%**

Ficomm 

N | E | X | U | S
STRATEGY

Source: 7/9/26 Google Gemini Search Results; 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partner's Stock Volume is....

Needs data

**Ficomm Partners
Stock Volume**



2024 2025

Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis



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