

Ficomm Partners

**A Wealth Management Firm
Marketing Strategy &
Execution Firm**

Tiburon Written Research
July 22, 2026



TIBURON STRATEGIC ADVISORS

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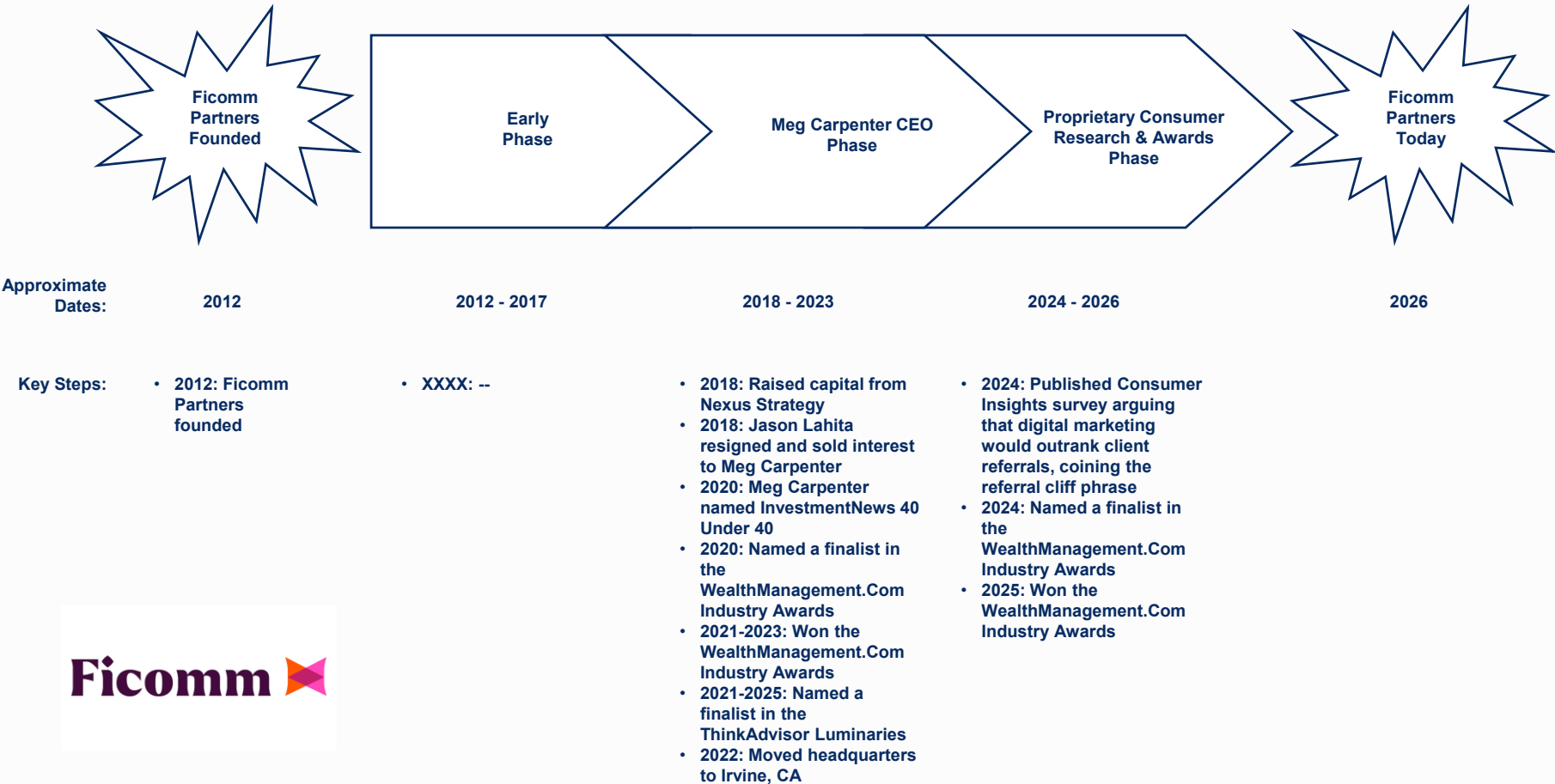
Comments

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

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

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

**Ficomm Partners
History**



Source: 7/10/26 Google Gemini Search Results; 7/9/26 Ficomm Partners Website; 10/25/24 Ficomm Partners Presentation (Carpenter); 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

Ficomm 

N | E | X | U | S
STRATEGY

Comments

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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

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Ficomm Partners Published its Consumer Insights Survey and Argued that Digital Marketing Would Outrank Client Referrals Within Five-To-Ten Years, Coining the Referral Cliff Phrase, in 2024



Comments

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Only 29% of financial advice buyers say they need a referral

Only 17% of financial advice buyers under the age of 44 need a referral

Only 31% of financial advise buyers with incomes over \$150,000/year need a referral

45% of financial advice buyers hired their advisor based on digital marketing

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

Ficomm Partners Has Won Many Awards, Starting with Meg Carpenter Being Named InvestmentNews 40 Under 40 in 2020

Ficomm Partners Awards & Recognition

InvestmentNews	WealthManagement.Com	ThinkAdvisor	Wealth Solutions Report
• 2020: Meg Carpenter named InvestmentNews 40 Under 40	• 2020: Named WealthManagement.Com Industry Awards finalist • 2021-2023: Named WealthManagement.Com Industry Awards winner • 2024: Named WealthManagement.Com Industry Awards finalist • 2025: Named WealthManagement.Com Industry Awards winner	• 2021-2025: Named ThinkAdvisor Luminaries finalist	• 2026: Named Wealth Solutions Report "Top Wealth Management Marketing Agency"     

InvestmentNews
June 29, 2020

WealthManagement.Com
June 5, 2020

ThinkAdvisor
October 1, 2021

Wealth Solutions Report
May 18, 2026

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

Ficomm Partners
Awards & Recognition

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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

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

Ficomm Partners Has a Podcast



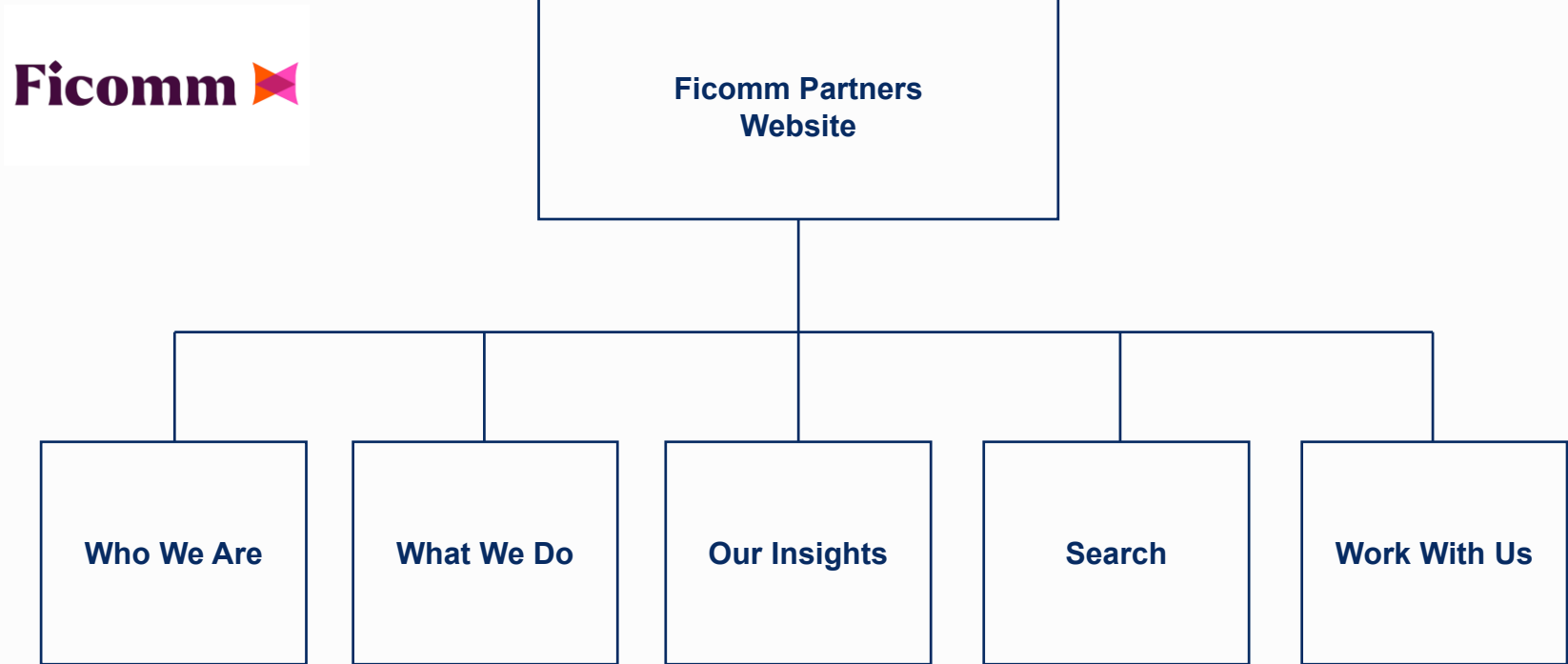
Comments

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

Ficomm Partners Has 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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Acquisitions

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

Ficomm Partners Has a Charitable Giving Program

Charitable
Giving

Comments

- --

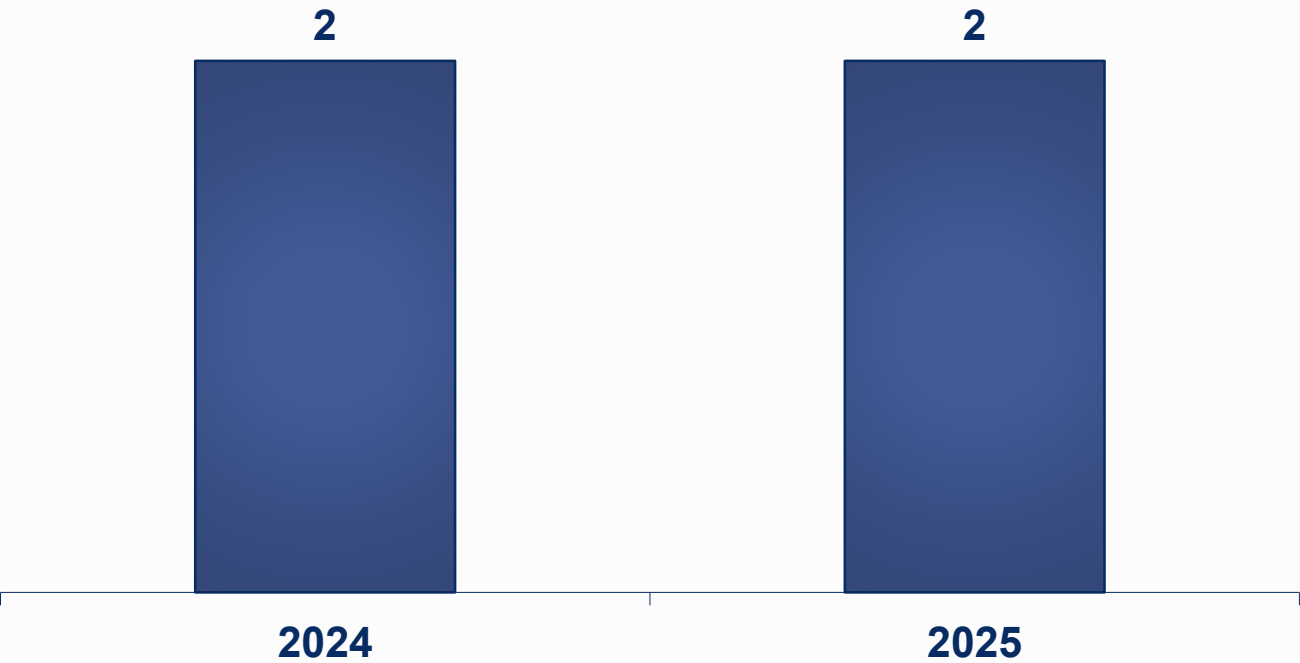


Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Has Two Offices, Consistent Since 2024



**Ficomm Partners
Offices**

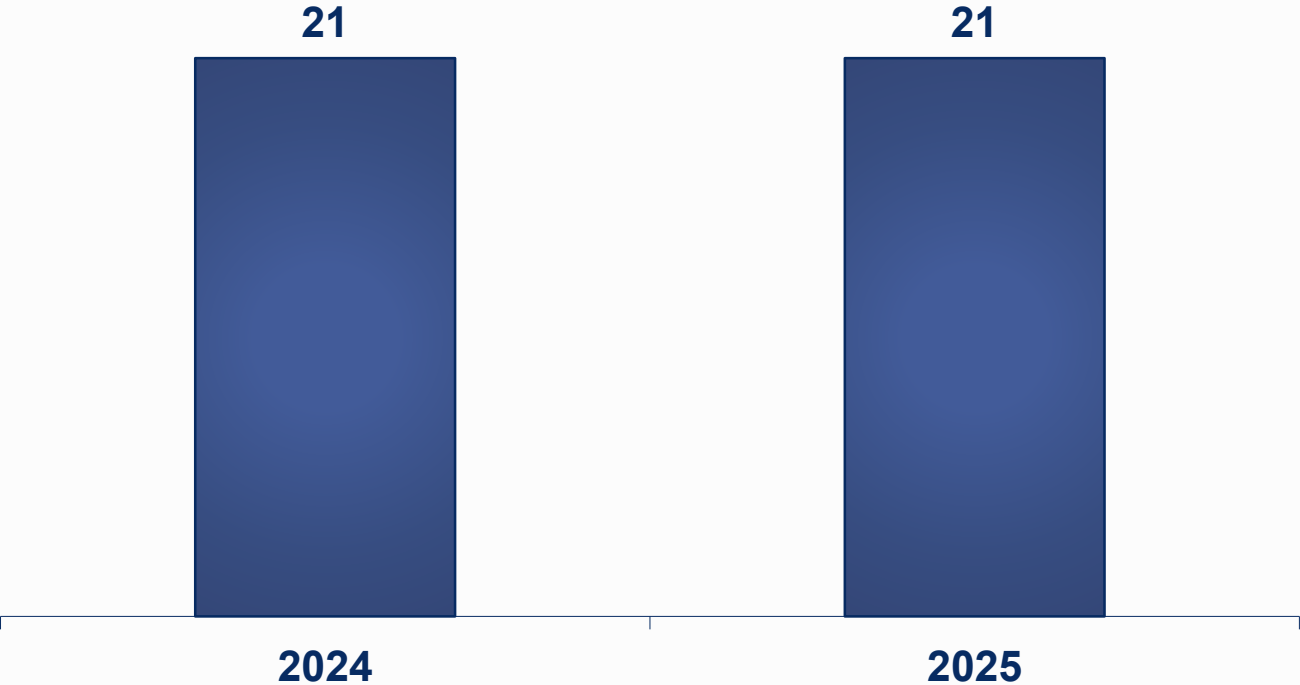


Source: 7/9/26 Google Gemini Search Results; 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Has 21 Employees, Consistent Since 2024



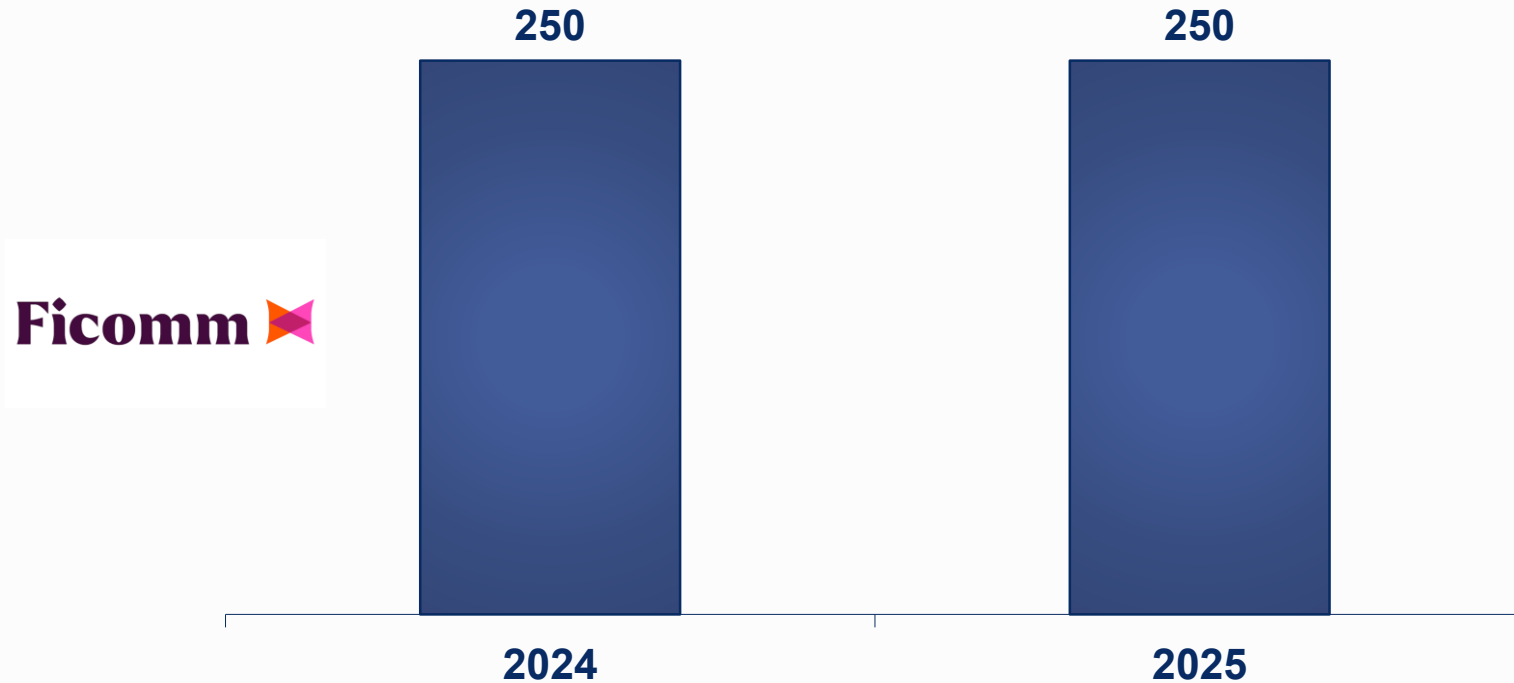
**Ficomm Partners
Employees**



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

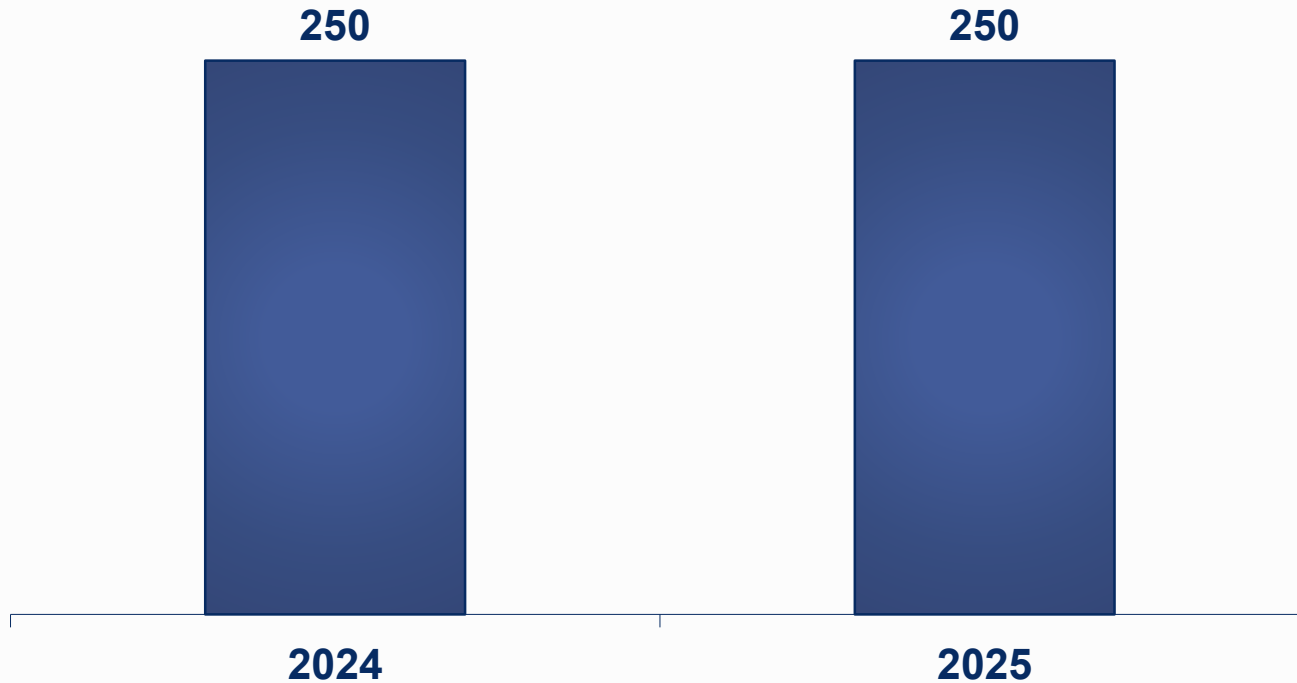


Source: 7/9/26 Ficomm Partners Website; 10/25/24 Ficomm Partners Presentation (Carpenter); Tiburon Research & Analysis

Ficomm Partners Has Served 250 Cumulative Financial Advisor Clients, Consistent Since 2024



Ficomm Partners Cumulative Financial Advisor Clients



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

Ficomm Partner's Cumulative Financial Advisor Clients Include ...

**Ficomm Partners
Cumulative Financial Advisor Clients**

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

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

Ficomm Partners' Cumulative Financial Advisor Clients Have Gathered \$XXX Billion Assets Under Management & Administration, Up/Down From \$XXX in 2024

**Ficomm Partners
Cumulative Financial Advisor Clients
Assets Under Management & Administration
(\$ Billions)**

Needs data

Ficomm Partners
fee-based financial
advisor (RIA)
clients have
realized a 15%
organic growth
rate

Ficomm 

2024

2025

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

Ficomm Partners Completed 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 Has Completed Cumulative Financial Advisor Client Projects

Needs data

Ficomm Partners Cumulative 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

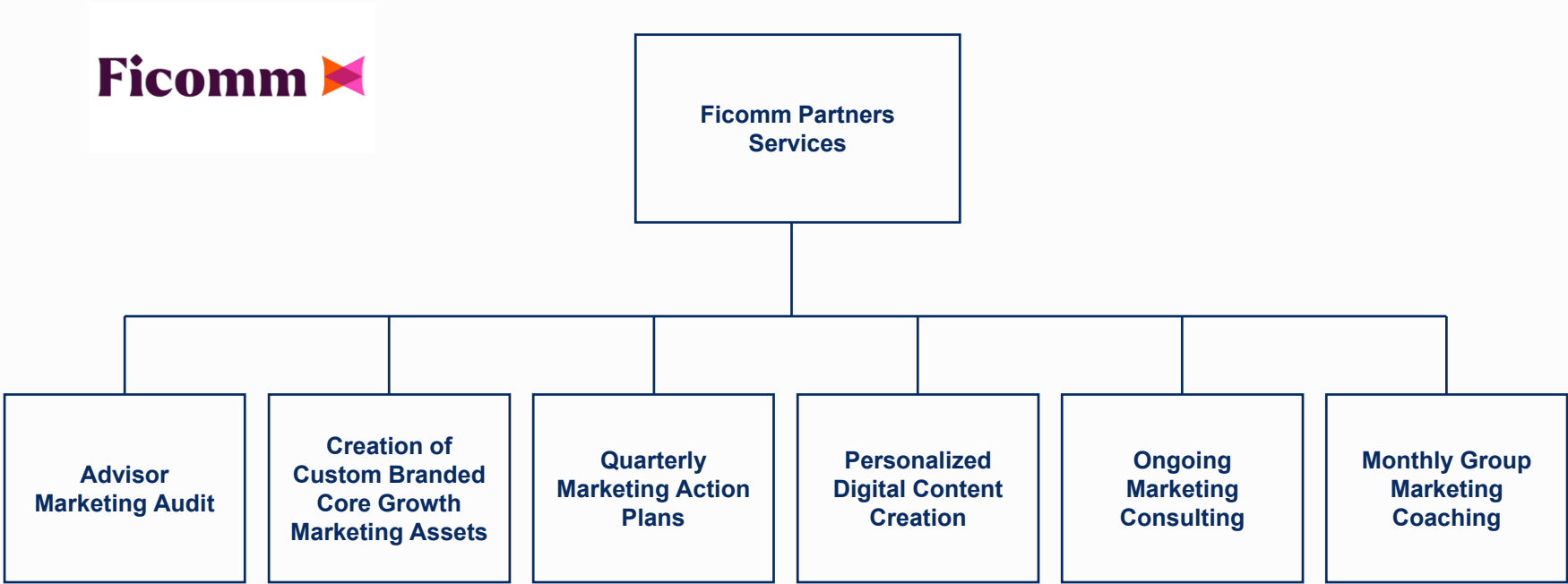
**Ficomm Partners
Net Profits
(\$ Millions)**



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

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Ficomm



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

Ficomm Partners Fifth Service is its Ongoing Marketing Consulting

Ongoing
Marketing
Consulting

Comments

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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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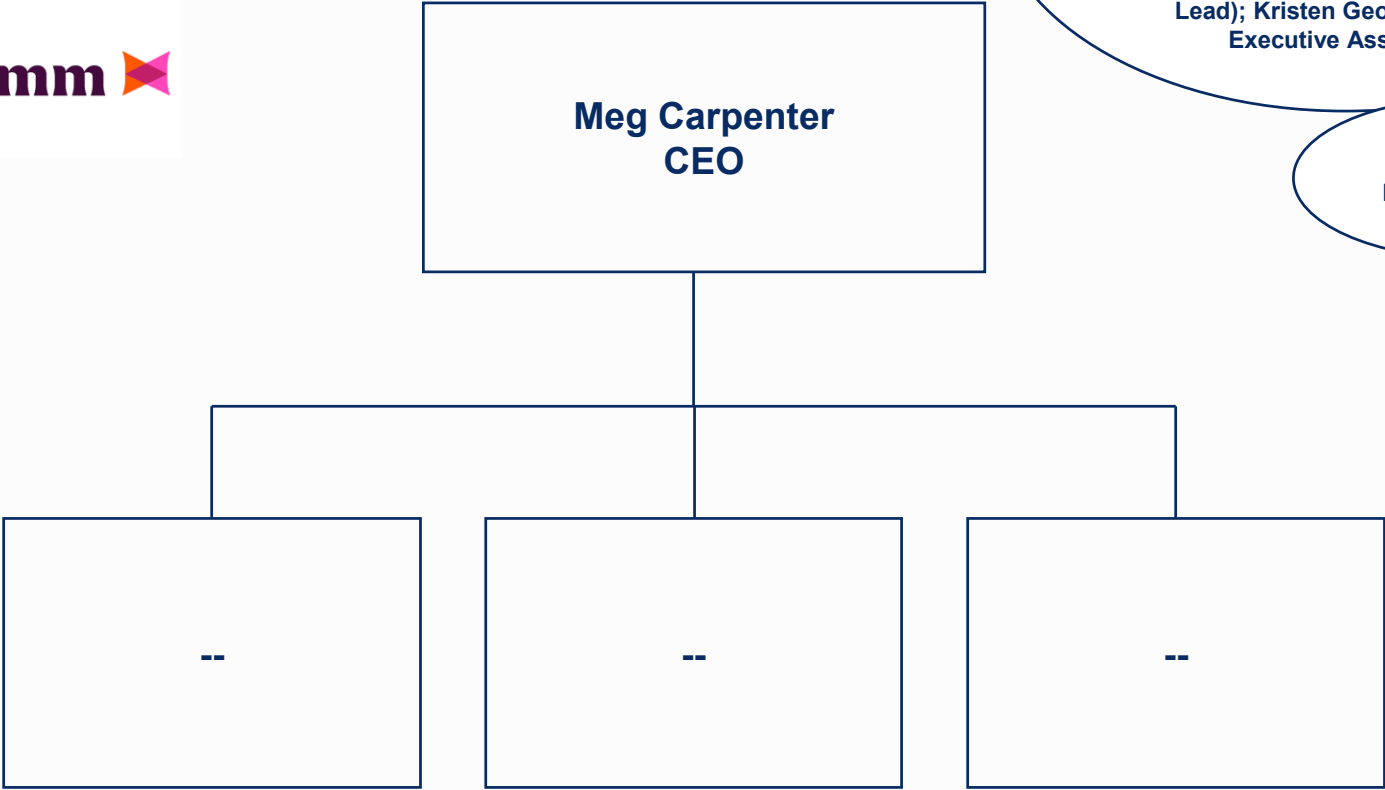
Ficomm 

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)

100% female leadership team

Note: Meg Carpenter co-founded the firm in 2012; she was previously at John Hancock Financial
Source: 7/9/26 Ficomm Partners Website; 10/25/24 Ficomm Partners Presentation (Carpenter); 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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Source: 7/9/26 Ficomm Partners Website; Tiburon Research & Analysis

Ficomm Partners Has Assets

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)**



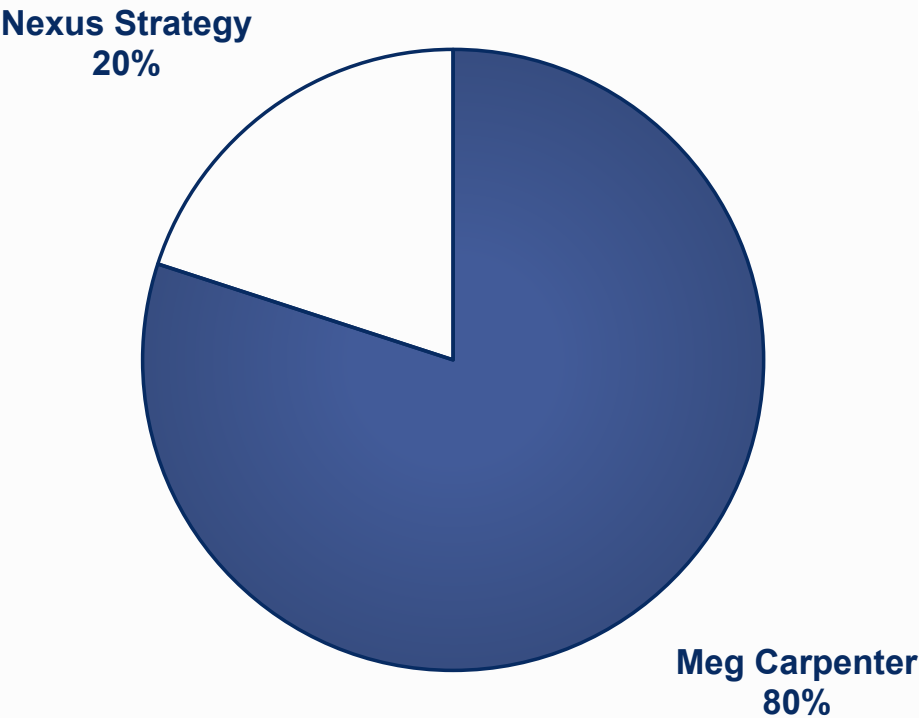
2024 2025

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

Ficomm Partners is Owned by Meg Carpenter and Nexus Strategy

Majority female ownership

Ficomm Partners Ownership By Owner



Source: 7/9/26 Google Gemini Search Results; 7/9/26 Ficomm Partners Website; 10/25/24 Ficomm Partners Presentation (Carpenter); 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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