ClientFirst
WEALTH MANAGEMENT

WHY IS CLIENTFIRST THE TAX PROFESSIONAL'S CHOICE FOR CLIENT REFERRALS?

1 **Peace of mind:** Your clients always work with a CFP professional and fiduciary. Unlike brokerage firms we don't sell products, accept commissions or have sales quotas and there are no hidden fees. We are a full-time fiduciary. Our fiduciary legal obligation to clients is never suspended or diluted. And your clients have a choice of account custodians, including Charles Schwab.

2 **Top-tier wealth management:** Renown financial planning, cost-effective investment management and exceptional service from an Arkansas RIA managing over $200 million for Arkansans. Resource partners include Charles Schwab, Vanguard, JP Morgan, Raymond James and others.

3 **Increased recurring revenue:** CPA referral partners receive a recurring retainer fee for tax planning and tax advisory. No more depending upon reciprocal referrals that fail to materialize or searching for a hassle-free solution to future-proof your practice.

ClientFirst's professional referral program is what savvy Arkansas tax professionals have been looking for to strengthen client relationships and increase recurring revenue without becoming a financial planner, selling products, M&A, or starting a registered investment advisor (RIA) from scratch. We also provide a unique opportunity to help attract new clients.

STUDIES SHOW MORE CLIENTS ARE LOOKING FOR A ONE-STOP SOLUTION FOR TAX, ADVISORY AND COMPREHENSIVE FINANCIAL PLANNING.

WE THINK YOU WILL AGREE THAT THE CPA AND CFP BRANDS ARE A POWERFUL COMBINATION - ONE THAT CLIENTS CAN TRUST.

Schedule a **discovery meeting**

1-800-600-8416

Visit https://www.clientfirstwm.com

for more information

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The following articles from CPA Practice Advisor and AICPA may be of interest:

The CPA Financial Planner – Facts and Opportunities

How to Expand Your Firm's Services by Offering Personal Financial Planning

Download our Ebook **HERE**

*ClientFirst is a NASBA-certified CPE provider.