



**EVOLV**  
FAMILY WEALTH

FOR ADVISOR-USE ONLY

## **Powered by a large national RIA and a successful boutique multi-family office**

Created for those who want to do more for their clients, earn more for themselves, and break free from the constraints of traditional firms

# TOP 3 REASONS

Advisors are leaving their current firms



1

## **Banks, wirehouses, and captive firms are too restrictive.**

Their default answer is no. This limits the advice, and therefore value you can deliver to your clients, not to mention your ability to build wealth for yourself.

Evolv's platform is focused on **freedom and flexibility**, creating solutions clients want and need and assisting advisors in building real wealth for themselves.



2

## **Bureaucracy and red tape creates constant frustration.**

The vast amount of time wasted on paperwork and compliance prevents you from focusing on your clients.

Evolv's goal is to make you as efficient as possible with **less paperwork** and **fewer roadblocks**, resulting in happier advisors and happier clients.



3

## **Compensation frustration.**

You may find yourself asking, *what am I really gaining from the 50-60% of revenue I give up?* As I generate higher levels of revenue, this structure benefits the firm more than it does me; not to mention the compensation structure changes regularly and can be confusing.

At Evolv, we're all about transparency of income and helping our advisors **increase profitability** as their business grows.



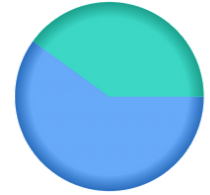
## Evolv Beyond Investments and Insurance

If you're looking for more capabilities and opportunities, without having to sacrifice more of your time...**it's time to Evolv your practice.** We'll help you monetize all your time spent with clients and gain more (or all) of their wallet share. Our Solutions are independent and objective to avoid conflicts of interest present with the manufacturer and distributor models at the big banks and captives.

### WIREHOUSE ADVISOR



1-2 Revenue Streams



8+ Revenue Streams

PERSONAL CFO  
AT EVOLV



### Typical Advisor Revenue Streams:

- Investment Management Fees
- Insurance Commissions



### Personal CFO Revenue Streams:

- Investment Management Fees
- Financial Planning Fees
- Monthly Retainer Fees
- Business Consulting Fees
- Real Estate Commissions
- Insurance Commissions (*Life, Disability, Medicare, Personal Lines (Home, Auto, etc.), Commercial Lines (General Liability, Workers Comp, etc.)*)
- Group Benefit Fees & Commissions (*401k, Pension, Health, Ancillary Plans*)

- ▶ **Offering higher than normal splits to the advisor on all revenue streams (50-80%, with most at 80%).**
- ▶ **Become a truly holistic advisor by delivering Evolv's Personal CFO solution.**
- ▶ **Offer your clients family-office style solutions built for scale.**
- ▶ **You are the single point of contact for all aspects of the client's financial picture.**

# EVOLV YOUR BOOK INTO A BUSINESS

The Evolv platform differs from the restrictive wirehouses, big banks, and captive models of the past because it's designed to work **for you**, while also setting you up for the highest future exit possible.



## EVOLV INTO THE ADVISOR OF THE FUTURE

Eliminate the bureaucracy and red tape that wastes so much of your time. Spend it where it matters most: **working with current clients and finding new ones.**

- Let the Evolv team handle time-consuming operational tasks.
- Leave the research, trading, reconciling, and reporting to our investment team.
- Feel confident in a compliance team that will ensure you are protected without slowing you down.

### WE'LL HANDLE:

BACK & MID-OFFICE ADMINISTRATION



TRADING & REPORTING



COMPLIANCE OVERSIGHT



KEY PARTNERSHIPS

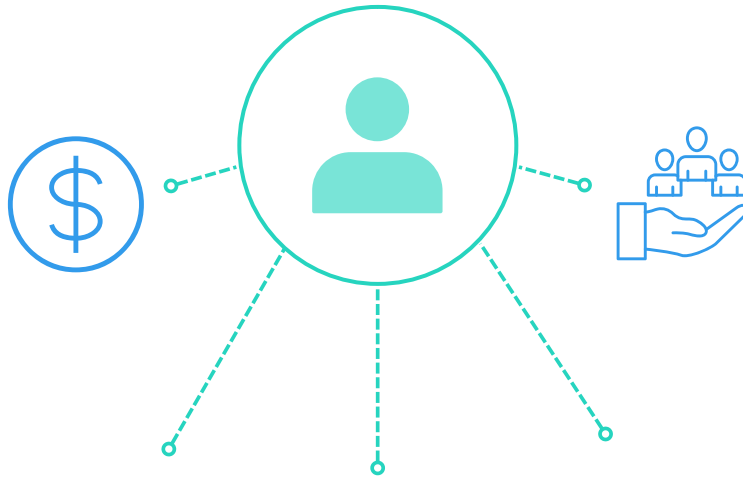
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A TEAM OF EXPERTS

# BUILT AROUND YOU

THE COMPLETE INTEGRATED ADVISOR

Leverage the Evolv brand and marketing for speed to market and attraction of higher net-worth clients.



Evolv's staffing solutions partner can help you expand when and if needed.

Evolv provides a fully integrated tech stack, giving you the tools to become a Personal CFO and manage your business effectively and efficiently.

Evolv's investment committee has created portfolio models designed specifically for Personal CFO solution clients.

Evolv has partnerships in place with key execution experts (real estate agents, lenders, attorneys, CPA's, nationwide car buying service, and many many more.)

## ADDITIONAL RESOURCES:



Evolv's real estate team can help you secure the perfect office space for your business whether it's a lease or a purchase. If you decide to purchase an office space, the Evolv team will show you exactly how to do it for maximum value creation and tax efficiency.



Evolv's M&A team can help you source, negotiate and finance the purchase other books of businesses if you are interested in pursuing inorganic growth. Evolv's proven transition process ensures you move the new clients to your control quickly and effectively.

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# TRUE WEALTH BUILDING

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**As an Independent Advisor you have control of your income and the value of your business. At Evolv, we'll help you use those assets to create real wealth for yourself.**

## IMMEDIATELY INCREASE TAKE-HOME PAY

**Wirehouse Problem:** Most firms pay the advisor 35-50% of the revenue the advisor generates.

**Evolv Solution:** You keep 50-80% of the revenue you generate, with most at 80%.

## ALL ABOUT TRANSPARENCY

**Wirehouse Problem:** Sales quotas, products to push, and confusing grids with annual changes.

**Evolv Solution:** You'll see the revenue you produce, and know the exact amount you get paid for every business line.

## REMOVING LIMITATIONS

**Wirehouse Problem:** Most firms prevent the advisor from purchasing commercial real estate, purchasing other advisor books, from having control of their P&L, and from being tax efficient with their income.

**Evolv Solution:** We encourage all of the above and will work alongside you in executing; providing expertise in search, negotiation, structure, financing, and transition.

## FULLY MONETIZE YOUR BUSINESS

**Wirehouse Problem:** Most firms require the advisor to sell and transition their business to a junior advisor at retirement. This internal sale removes competition and limits the revenue multiple you can achieve.

**Evolv Solution:** The platform and your business are designed to generate the highest potential revenue multiple on the open market, resulting in a bigger win at retirement.

## KEEP MORE OF WHAT YOU MAKE

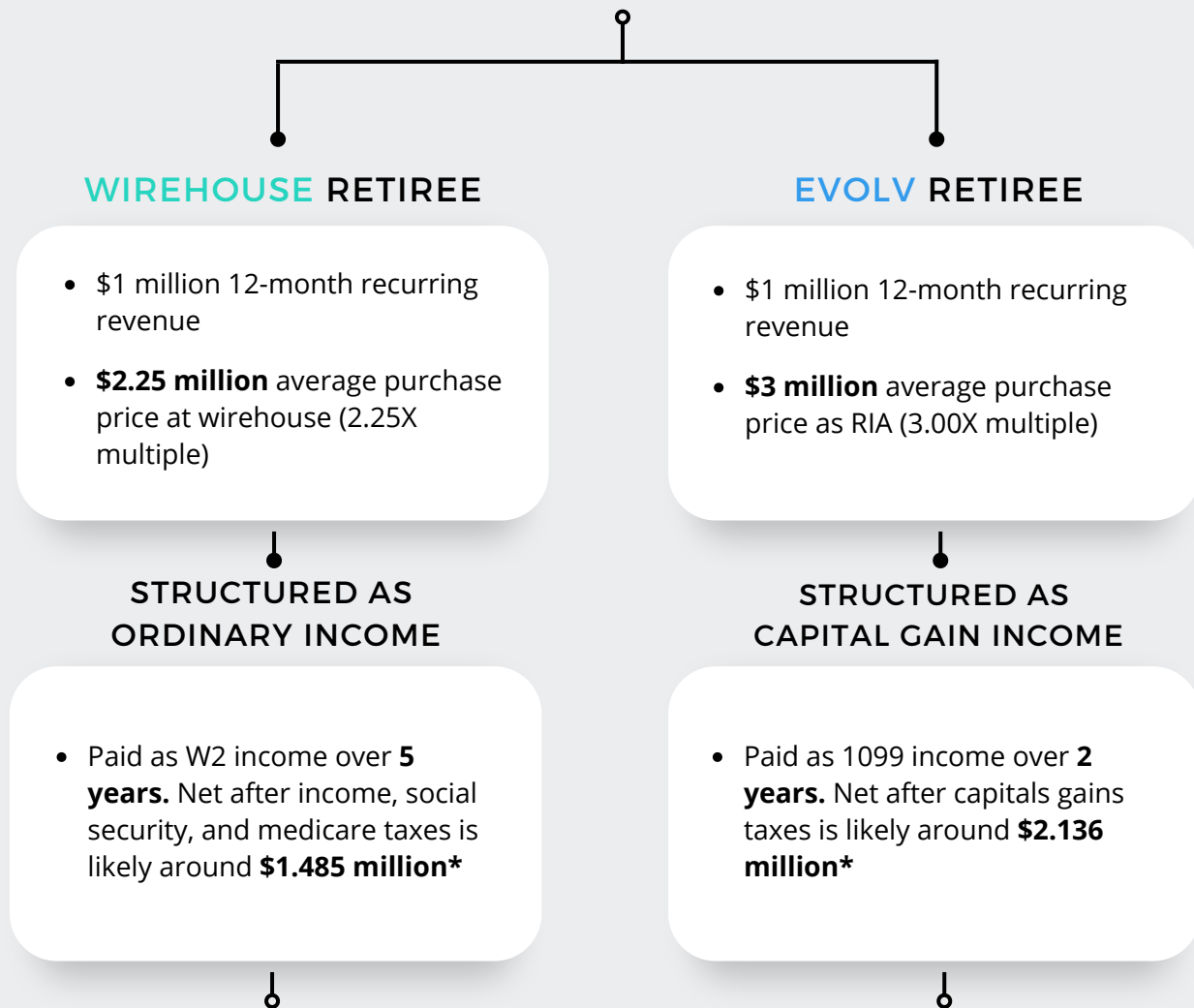
**Wirehouse Problem:** Most firms pay their advisors via W2 for both annual income and the retirement buy-out. Every dollar is subject to ordinary income tax rates and the annual maximums for Social Security and Medicare taxes.

**Evolv Solution:** Your income is paid as a 1099, opening the door to many tax-reduction strategies. When you sell your business in the future, the income will be structured as long-term capital gain which results in a much lower tax rate; and more money in your pocket.



## ONE PRACTICE: TWO VERY DIFFERENT OUTCOMES

The difference is in the structure. The math speaks for itself.



By simply moving this business from the wirehouse to an RIA, you increase your net worth by \$651,000 and receive the full purchase amount 3 years earlier.

*\*Predictions were calculated by using a tax filing status of married filing-jointly for someone living in North Carolina that did not receive other income during the years the income from the sale is received. Actual results will vary widely based on a number of factors.*



Serve your clients as a true fiduciary and single point of contact with the Evolv platform's deep bench of solutions offered independently and objectively.



## ACCESS TO BEST IN CLASS PRODUCTS & SERVICES

**Wirehouse/Captive's Perceived Breadth:** The advisor has the benefit of accessing the bank's investment management, lending, banking, and trust services, allowing them to build a "family office" structure for their clients.

**Wirehouse/Captive's Reality:** The problem is, all of those products and solutions come from one manufacturer. This presents conflicts of interest and clients end up with less than ideal solution sets. Additionally, advisors are restricted from building tax, real estate, risk management and legal strategies for clients, resulting in gaps in the client plan.



## THE EVOLV DIFFERENCE

### Situational Example:

- An Evolv Personal CFO taps a key partner at one of the big banks to shop a jumbo loan for their client.
- The key partner declines to assist as their bank's jumbo product is not competitive at the moment and instead makes a referral to a lender with a great product. The CFO shops that lender and a number of other key partners to get the client the best terms possible.

### Distinctly Different Outcomes:

- The Evolv client gets the best product available for their situation
- The wirehouse client gets the sub-par product as that's the only solution available to them. The worst part is, the bank knows, and self-admits this conflict of interest.



## DELIVER REAL VALUE FOR YOUR CLIENTS

When you join Evolv, you'll have access to the same solutions you do at the bank, but they are built in an **open architecture framework** to ensure you can always find the best solution for your client. Beyond those base services, the Evolv platform adds a multitude of solutions not available at the wirehouses and captive firms, allowing you to create the true family-office for your clients.



## FOCUS ON WHAT MATTERS

Investment performance is an important factor in client satisfaction; but it's a commoditized service. Evolv's in-house investment team will professionally create and manage portfolios for your clients in an institutional and cost/tax efficient manner. Your focus can be spent where it makes the biggest impact - deepening your client relationships, wallet share, and attracting new clients.





## Your Personal CFO

- Is the single point of contact for every area of your financial picture.
- Is an expert at understanding you, your goals, and managing your experts to deliver advice and get things done.
- Saves you time, gets you better, more holistic answers, and in the long run saves you money.

## Your Benefits

- You will experience peace of mind knowing your Personal CFO is always watching your back and driving towards successfully achieving your goals.
- You are the CEO of your finances. You set the vision, provide the resources, make decisions, and sign dotted lines. Your Personal CFO handles the rest.



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What is a Personal CFO? [Learn More](#)



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