

Nest Capital Model Video Transcript

Nest Capital Logo image

Hello, my name's Tim Irwin and I'm the head of growth for NEST Capital. NEST Capital is an independent wealth management enterprise with a goal of helping financial advisors find their path to supported independence. We operate with a client-first approach, and with a shared goal of helping clients and, our practice owners, accomplish their goals. If you, or someone you know, is a financial advisor considering the independent model, NEST may just be the perfect fit.

You can think of the Nest Capital model in 3 main ways.

Number one, true business ownership. As an affiliate of NEST, you have total ownership of your book of business AND get to realize all the potential benefits that go along with it, without the stress of feeling like you're operating on your own. We've run this model ourselves for decades, and we've helped complete affiliations and acquisitions before. We can help you do the same for your business. With NEST, you get a built-in advisory board to tap into – anytime.

Number two, flexibility. Independent advisor at NEST Capital, you'll have the ability to grow your business and serve your clients in a way that best meets their needs. NEST provides support with a team of multi-talented professionals behind you, but you'll also have the flexibility to run your business as you see fit. We're committed to supporting our practice owners in every way, from training and development, to marketing and sales support, to operations and compliance. Within our practice and through our affiliation with Wells Fargo Advisors Financial Network premier independent platform, we're able to provide the support you need and eliminate the distractions standing in your way.

I say number 3 is Optionality. We have a multitude of options for affiliation, continuity, and succession from

which to choose. So whether you want to grow your practice for the next twenty five years, are looking for a beer succession plan in the next two, or somewhere in between, together we can structure an affiliation plan to help you meet your goals. In short, we believe NEST Capital is the best model for independently minded advisors to join, run, grow, or transition your practice. If you're looking to take control of your book of business, we encourage you to see if NEST Capital is right for you, and your family, and your clients.

Nest Capital be the financial advisor you want to be.

Contact Us

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QR Code image that leads to <https://www.nestcapital.com/>

614.618.3445

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