



WE ARE

NEST CAPITAL

TEAM OVERVIEW



YOU DON'T NEED TO GO INDEPENDENT ALONE!

OUR MISSION

Our mission is to help financial advisors find a better path to independence, while providing more options when it comes to owning and running your own business.

OUR PEOPLE

NEST Capital is powered by more than 75 professionals, including 41 client-facing advisors who bring over 800 years of combined industry experience. Their collective expertise reflects a deep commitment to excellence and trusted guidance.

OUR TEAM



ASSETS UNDER MANAGEMENT

\$4.9 billion (as of January 2026)



BROKER DEALER

Wells Fargo Advisors Financial Network (FiNet)



IN BUSINESS SINCE

1984

WHY JOIN NEST

100% Ownership of your book of business



Competitive payout + transition bonus potential for qualifying practices



Join a top FiNet practice



Full access to a comprehensive suite of products & services



Tailor your own brand to stand out and maintain your identity



Maximize the value of your business today while preparing for the succession you deserve



Expand Your Practice with NEST Capital

Our Core Values

- **Growth Mindset** - Relentless growth; endless progress
- **Enjoyment** - Lead with heart and cherish every moment
- **Teamwork** - Embrace diversity; succeed together



Our Integration Pathways

Lite Affiliate - Advisors operate as business owners, retaining full control and independence over their practice. NEST provides limited but strategic support in the areas that matter most.

Full Affiliate - Advisors maintain full ownership of their practice while tapping into NEST’s full support ecosystem—working independently, but never alone.

Acquisition and Continuity - Advisors can gain financial security and a built-in succession plan—while continuing to run their business independently, backed by NEST’s full support.

Our Locations

We are location agnostic. Our geographic footprint spans across the country, including 16 office locations within the following states:

- ✓ Colorado (1)
- ✓ Florida (1)
- ✓ Georgia (1)
- ✓ Illinois (2)
- ✓ Indiana (1)
- ✓ Louisiana (1)
- ✓ North Carolina (3)
- ✓ Ohio (6)



Branding & Marketing Support

Our demonstrated marketing insight and a recognized brand, combined with your local brand presence, drives results.



Service, Operations & Compliance Support

The service and protection you need, when you need it most.



Learning & Development

Accessible leadership, coaches and training resources help you leverage best practices and stay on target to reach your goals.



Transition Support

From the moment you accept the offer, through every phase of your transition, we will help make your move smooth.

Are you ready to make a move to owning your business?
Reach out today to start your journey toward independence.



CALL TO LEARN MORE
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