

Affiliation Model Features

Hybrid

- ✓ Compliance support
- ✓ Marketing support
 - Website support for your own page on TrueJourney website
- ✓ Backup CA support from our other support staff if your local staff is on PTO
- ✓ Optional monthly FA calls for ideas from other TrueJourney advisors and guest speakers
- ✓ Annual FA meeting to collaborate with peers and work on ideas to help manage your business
- ✓ Continued practice management support
- ✓ TrueJourney covers all Wells Fargo Advisors Financial Network platform fees
- ✓ Optional access for staff to TrueJourney's Health/Dental/Vision/H.S.A. and other benefits for a fee
- ✓ Assistance in transition to TrueJourney, which provides technology, utilities, furniture, and office supplies — everything needed for a turn-key ready office
- ✓ TrueJourney pays for office space, signage, utilities, internet, networking, and furnishings at office location as part of Branch Expense
- ✓ We allocate 5% of your 12/31 T-12 revenue to help cover the cost of your support staff (benefits, FICA, 401(k) match) and you retain full control over setting their salaries and awarding bonuses
- ✓ Collaboration with other TrueJourney offices

Supported Independence

- ✓ Compliance support
- ✓ Marketing support
 - Website support for your own page on TrueJourney website
- ✓ Limited backup CA support from our other support staff if your local staff is on PTO
- ✓ Optional monthly FA calls for ideas from other TrueJourney advisors and guest speakers
- ✓ Annual FA meeting to collaborate with peers and work on ideas to help manage your business
- ✓ Continued practice management support
- ✓ TrueJourney covers all Wells Fargo Advisors Financial Network platform fees
- ✓ Optional access for staff to TrueJourney's Health/Dental/Vision/H.S.A. and other benefits for a fee
- ✓ Assistance in transition to Wells Fargo Advisors Financial Network

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