

# TrueJourney Hybrid Affiliate Relationship

## Value-Added Services Overview

---

TrueJourney offers a comprehensive suite of back-office, operational, and practice support services designed to empower advisors to focus on client relationships while leveraging the strength and scale of an institutional platform.



### Leadership & Alignment

- **Experienced Executive Team:** TrueJourney's leadership team brings over 100 years of combined financial services experience. This collaborative group is dedicated to ensuring affiliate advisors have the strategic guidance, resources, and support necessary to grow and sustain a successful practice.
- **Equity Participation Opportunity:** Affiliate advisors may participate in TrueJourney's non-voting stock program, providing the opportunity to share in the firm's long-term growth and value creation alongside their own practice success.



### Investment Management

- **Outsourced CIO Function (Helios):** Gain access to Helios Quantitative Research as a fractional investment department, delivering institutional-quality portfolio construction and data-driven insights, without the overhead of building an internal team.
- **Quantitative Model Ecosystem:** Implement customized, rules-based investment strategies that dynamically adapt to changing market conditions, supported by disciplined risk management and scalable execution.



### Branded Marketing Support

- **Custom-Branded Content:** Access professionally designed, high-quality marketing materials, enhancing your market presence and client engagement.
- **Marketing Consultation:** Receive personalized guidance to develop and execute targeted marketing initiatives aligned with your growth objectives.
- **Centralized Resource Portal:** Utilize the TrueJourney marketing portal for on-demand access to approved materials and branded assets.

[continued >](#)

# TrueJourney Hybrid Affiliate Relationship

## Value-Added Services Overview

---



### Operational & Human Resources Support

- **Employee Management:** TrueJourney serves as the employer for administrative staff, managing payroll, PTO, taxes, and employee benefits to reduce your administrative burden.
- **Comprehensive HR Services:** From recruiting and onboarding to performance management and regulatory compliance, all human capital functions are fully supported.
- **Business Continuity Support:** Access temporary administrative coverage during staff absences or unexpected disruptions to maintain seamless operations.
- **Retirement Plan Flexibility:** As an independent affiliate, you retain the flexibility to establish and manage your own retirement plans (e.g., SEP-IRA, Solo 401(k)), optimized for your individual goals.



### Infrastructure & Technology

- **Institutional-Grade Platform:** Fully integrated access to leading portfolio management systems, research tools, and secure data infrastructure.
- **Turnkey IT & Cybersecurity:** TrueJourney manages all technology, networking, and cybersecurity requirements in partnership with Nuvera, ensuring compliance with industry and regulatory standards.
- **Compliance & Audit Oversight:** Benefit from comprehensive compliance supervision, including ongoing monitoring and annual audits. Advisors are relieved of the need to obtain supervisory licenses (e.g., Series 24 or 9/10), allowing full focus on client service.



### Facilities & Real Estate

- **Flexible Office Access:** Utilize TrueJourney home office locations and affiliate offices for client meetings and collaboration.
- **Lease & Facility Management:** TrueJourney manages commercial leases, utilities, maintenance, and insurance, removing the operational complexities of office management.



### Practice Continuity & Succession Planning

- **Continuity Management:** In the event of death or disability, TrueJourney provides a structured solution to ensure uninterrupted client service and orderly transition of the practice.
- **Guaranteed Buyout Program:** A defined and standardized approach to valuing and purchasing your client relationships upon retirement, permanent disability, or death — providing clarity and security for you and your family.