

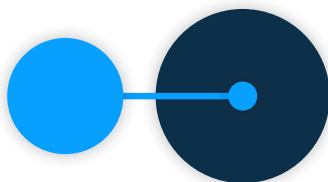
# Solutions for Growth with Carson

No matter where you are in your career, advisors need support to move their business forward.

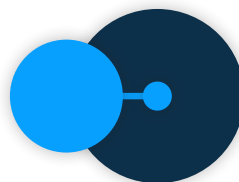
Whether you want to grow your firm while maintaining independence, leverage an investor for better balance, or plan a thoughtful and comprehensive exit strategy on your timeline, we have a solution to fit your needs.

- 1 Affiliate with Carson** as an independent advisor for industry-leading resources and networking opportunities.
- 2 Become a Carson Wealth firm** to monetize partial equity value and enjoy flexible succession solutions.
- 3 Join a Carson Partner firm** for more robust and scalable support.

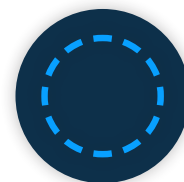
**Carson's three tiered solutions were designed to help advisors move the needle and plan for a bright future – whatever you want that future to look like.**



**Affiliate with  
Carson**






**Become  
a Carson  
Wealth firm**



**Join a Carson  
Partner firm**

# Discover the Partnership Option That Works for You

	Resources	Ownership	Succession
 <b>No</b> liquidity	<ul style="list-style-type: none"><li>» Technology, Investments, Compliance, Marketing, Consulting, M&amp;A, &amp; more</li></ul>	<ul style="list-style-type: none"><li>» <u>Retain 100% ownership</u> of your firm</li></ul>	<ul style="list-style-type: none"><li>» Built-in partnership network for future succession</li><li>» <u>Carson available as a backstop</u></li></ul>
 <b>Partial</b> liquidity	<ul style="list-style-type: none"><li>» Technology, Investments, Compliance, Marketing, Consulting, M&amp;A, &amp; more</li></ul>	<ul style="list-style-type: none"><li>» <u>Maintain majority stake and control</u> in your business</li></ul>	<ul style="list-style-type: none"><li>» Embedded partner allows for <u>seamless transfer of equity</u></li><li>» Gives you flexibility to sell to internal partners or external party</li></ul>
 <b>Full</b> liquidity/ merger	<ul style="list-style-type: none"><li>» Technology, Investments, Compliance, Marketing, Consulting, M&amp;A, &amp; more</li><li>» <b>Additional local support from partner you merge with</b></li></ul>	<ul style="list-style-type: none"><li>» <u>Sell a majority or 100%</u> of your business to a Carson Partner</li></ul>	<ul style="list-style-type: none"><li>» <u>Succession solved on the outset</u>, allowing you to exit on your time frame</li></ul>

## Learn More About Partnership Options

**Contact us today**

Email: [info@carsongroup.com](mailto:info@carsongroup.com)

Call: 888.321.0808