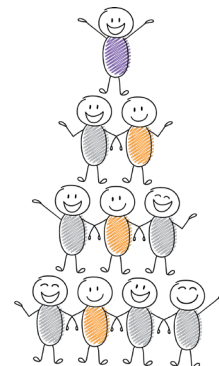


Elevate Independence Alliance

From thinking to thriving as an independent RIA firm.



Is it time to breakaway and setup your own independent RIA?

If yes, you may be feeling apprehensive about the amount of legal and compliance requirements that are necessary. Navigating this transition on your own can be overwhelming, especially when there are so many things to do! Like most big decisions, working with a team of seasoned professionals helps.

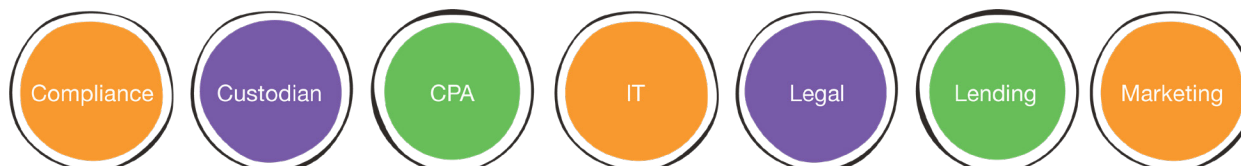
Not sure where to start?

You're not alone. Many of the financial advisors that we work with ask for our recommendations to help with their legal, compliance, custodian, IT, marketing needs and more. Over the years, we have come to trust and recommend a select group of professional experts. To help make this transition easier, we created and lead the Elevate Independence Alliance.

The professionals included in the Elevate Independence Alliance have a lot in common:

- Tried, tested and trusted by Elevate CPA Group;
- Experts in their field that serve the financial services industry;
- Provide a valuable service to financial advisors that are setting up an independent RIA.

Who makes up Elevate's Independence Alliance?



How does Elevate CPA Group help financial advisors' breakaway to become independent RIA firms?

We know the financial services industry. Elevate CPA Group only works with financial professionals (financial advisors, certified financial planners, wealth managers, etc.) and have lots of experience helping to setup successful independent RIA firms. We help them to setup their company, books and records, tax and accounting and much, much more. Plus, we created and lead the Elevate Independence Alliance. This is a group of professionals that, like us, are dedicated to the financial services industry and includes all of the professional experts you need to become an independent RIA firm. The Elevate Independence Alliance helps you setup a successful independent RIA and makes the transition process smooth sailing!



Start your independent RIA with the right team

Starting your own breakaway RIA firm can be overwhelming. Call Elevate CPA Group to access the Elevate Independent Alliance for the expert professional advice and support you need to become an independent RIA.

Schedule your
free consultation!



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