

Could Today's Turbulent Market Be Your Getaway Car?



As uncertainty sweeps our nation and market turbulence increases, investors need advice now more than ever—especially thoughtful, independent advice that addresses their personal situations instead of just repeating what they hear in the media.

So if you've been considering taking the leap to independence, now is the perfect time to evaluate whether or not your legacy system is set up to address the challenges investors are facing.

- Are you able to easily access your platform and communicate with your clients, even when you're out of the office?
- Can you efficiently take advantage of current tax-loss harvesting benefits?
- Is your prospecting portal attractive enough to engage dissatisfied investors who are using the crisis as a catalyst to shop around?

As we've seen in previous downturns, the market typically bounces back. So instead of viewing COVID-19 as a disaster, seize the opportunity it presents: the chance to break away with incredible momentum.

We're here to help. Our breakaway playbook offers insight, guidance, and an in-depth analysis of the technology you need to jumpstart your independence. Thinking about making your move?

Download our playbook [here](#).