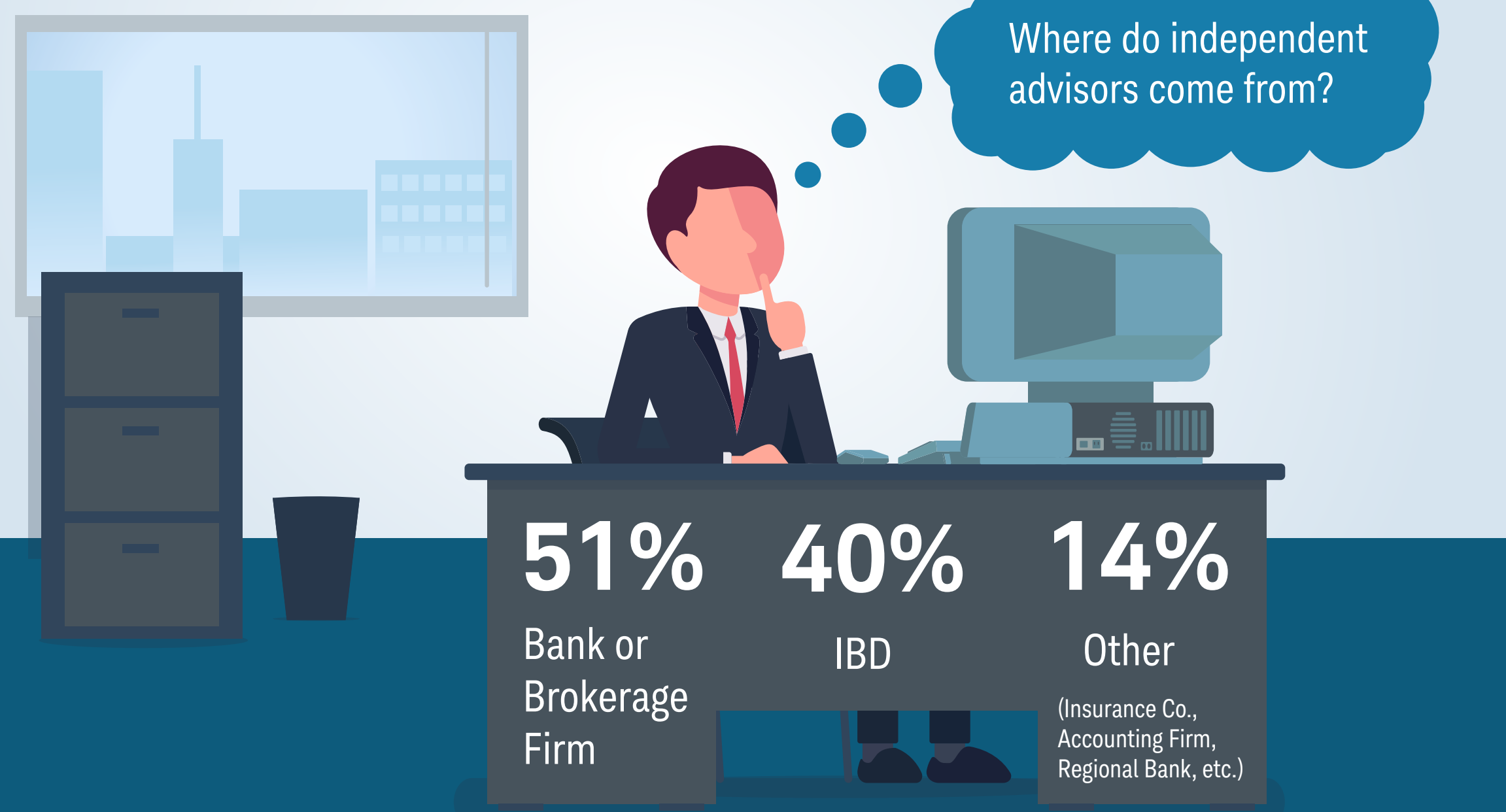


The Independent Transformation

Insights from newly independent advisors

Last stop before independence



66%

of advisors take **less than 3 years** to decide to go independent.



47%

take **6 months or less** to transition and move clients.

Most important steps to going independent

- 1 Retain clients
- 2 Evaluate the economics
- 3 Transition planning & client paperwork

73%

of advisors say they can build better, longer-term relationships with clients after going independent.

87%

of clients stay with their advisors when they move to the independent model.

No regrets

70%

of advisors have increased their revenue since going independent.

90%

would make the decision again and are **happier now** that they are **independent**.

Source:

Independent Advisor Sophomore Study, Schwab Advisor Services, March 2018

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