



October 22, 2013 09:00 ET

## The Alliance for Registered Investment Advisors (aRIA) Releases First Two Case Studies on Member Advisory Firms, of a Six Part Series

PHOENIX, AZ--(Marketwired - October 22, 2013) –

- *Beacon Pointe Advisors and Savant Capital Management are the first out of six aRIA members to share detailed accounts on the building of their successful RIAs.*
- *Subsequent case studies will feature Carson Wealth Management, Highline Wealth Management, Stratos Wealth Partners, and Exencial Wealth Advisors.*
- *All six case studies will be available upon release on the aRIA website and will be published by year end.*

The Alliance for Registered Investment Advisors (aRIA), a think-tank comprised of six elite RIA firms that collectively manage more than \$20 billion in client assets, today released the first two case studies of a six part series on their member RIA firms. Entitled "How to Grow Bionically vs. Organically With an M&A Strategy" and "How to Identify & Invest in High-Upside Individuals," these first two case studies detail the experiences and strategies of aRIA member firms Savant Capital Management and Beacon Pointe Advisors, managing \$3.3 billion and \$5.6 billion in assets respectively.

In the Savant Capital case study, "How to Grow Bionically vs. Organically With an M&A Strategy," Savant CEO Brent Brodeski discusses Savant's merger with The Monitor Group (TMG). Brodeski takes the reader behind the deal curtain to reveal challenges and specifics about the deal that have not previously been released. The study analyzes Savant's transition from being organically growth-focused to incorporating the Savant-coined term "bionic growth" into their growth strategy with the merger of TMG, a \$500 million AUM RIA based in McLean, VA.

The Beacon Pointe case study "How to Identify & Invest in High-Upside Individuals," written by Beacon Pointe President Matt Cooper, details the creation of Beacon's successful financial planning practice through strategic and effective hires. As with each case study in the series, the member firms identify their mistakes and accuracies in order to lead the reader through their path to success. This particular study demonstrates how Beacon Pointe was not only able to hire top talent, but also knew when the timing was right for their firm -- a step that is crucial to any RIA's growth.

"With this six-part case study series, our intention is to share our member firms' secrets to success with our advisor colleagues. I believe that these first two studies are indicative of the quality of thought leadership our member firms are able to put forth," said **John Furey**, aRIA Founder. "We founded aRIA in the hopes of creating an elite advisor think tank that would benefit our entire industry. It's inspiring to see our members continue to express willingness to bare all for the sake

of helping their RIA community. I learn from them every day and I hope others in the industry benefit from their experiences as well."

The remaining case studies will focus on the following aRIA member firms: Carson Wealth Management, Exencial Wealth Advisors, Highline Wealth Management, and Stratos Wealth Partners. All published case studies are available for free to advisors and journalists at [www.allianceforrias.com](http://www.allianceforrias.com).

#### **About Alliance for Registered Investment Advisors (aRIA)**

aRIA, Alliance for Registered Investment Advisors, is a think tank study group composed of six elite RIA firms that collectively manage more than \$20 billion in client assets, and Advisor Growth Strategies, a leading consulting firm serving the wealth management industry. The group offers insight for advisors considering ways to enhance their firms' enterprise value. Members include Brent Brodeski, CEO of Savant Capital; John Burns, Principal at Exencial Wealth Advisors; Ron Carson, CEO of Carson Wealth Management Group; Jeff Concepcion, CEO of Stratos Wealth Partners; Matt Cooper, President of Beacon Pointe Wealth Advisors; Neal Simon, CEO of Highline Wealth Management; and **John Furey**, Principal of Advisor Growth Strategies, LLC. The group meets regularly, releasing thought leadership pieces of interest to both independent and wirehouse advisors interested in exploring long-term growth strategies. For more information please visit [www.allianceforrias.com](http://www.allianceforrias.com).

#### **About Savant Capital Management**

Savant Capital Management offers investment management, financial planning, and family office services to financially established individuals, trust funds, retirement plans and non-profit organizations. For more information on Savant Capital Management, log on to [www.savantcapital.com](http://www.savantcapital.com).

#### **About Beacon Pointe Wealth Advisors**

Beacon Pointe Advisors is an independent Registered Investment Advisory (RIA) firm with a mission to provide highly professional, comprehensive, and objective investment and financial advice for both institutions and wealthy families. More about Beacon Pointe Advisors: [www.bpadvisors.com](http://www.bpadvisors.com).