Titleist | Advisor Network

The Growth-Ready Advisor

A 90-day blueprint to own your equity, escape the M&A hamster wheel, and scale with clarity.

INTRODUCTION

The Entrepreneurial Paradox: Success Without Freedom

Feeling undercompensated and undervalued isn't a failure of your business model. It's a fundamental structural failure of the traditional system that serves the firm, not the advisor.

You built a powerful business, secured a loyal client base, and consistently outperformed expectations. Yet, the reward for your success is restriction. This is the entrepreneurial paradox.

The hard work of building a successful book was supposed to lead to freedom and true ownership, but the legacy model extracted a heavy toll—a silent tax on your ambition. You're forced to spend time fighting firm bureaucracy, trying to decipher opaque payout structures, and watching your hard-earned equity constantly threatened by the next wave of M&A.

Are you stuck on the M&A hamster wheel, serving someone else's platform instead of fully owning your enterprise?

The Purpose of This 90-Day Blueprint

This blueprint is written for you, the advisor who recognizes that true independence is not just about breaking away, it's about building something better. It's a 90-day strategic guide to help you transition out of the bureaucratic trap and into a freedom-first partnership where your success is the only priority. In this guide, we'll show you how to move past the uncertainty and de-risk your transition by providing:

1. A path to 100% equity ownership of your book and brand.
2. A partnership with crystal-clear economics and no hidden agendas.
3. A proven, turnkey roadmap to navigate the legal, operational, and technological setup in 90 days.

Your next chapter of growth requires clarity, confidence, and control. Ready to claim it? Let's begin.

KICKER: THE HIDDEN COST OF SUCCESS

The Bureaucratic Trap: Where Growth Stalls

You've achieved significant success, but if you're operating within a legacy firm, you know the feeling of constantly fighting friction.

The system you rely on is designed to control, not empower. This bureaucratic trap manifests in three costly ways:

The M&A Hamster Wheel: Constant change is the new normal. Your firm is acquired, merges, or pivots strategy, and suddenly, the partnership you signed up for is unrecognizable. Every shift introduces new compliance layers, tech platform changes, and cultural misalignments, all of which erode client trust and derail your focus on growth. You become a passive participant in someone else's corporate strategy, rather than the architect of your own.

The Silent Tax on Time: How many hours do you spend debating payout details, navigating outdated technology, or fighting for approval on a basic marketing decision? This is time that should be spent serving clients or finding new ones. Legacy firms talk about "support," but often deliver firm bureaucracy, a crushing administrative lift that limits your capacity for growth.

The Undervalued Advisor: True autonomy is a myth when you face proprietary product mandates, internal gatekeeping, and opaque economics. You're prevented from acting as a true fiduciary because the firm's agenda is prioritized over your client's best interest. You are not a partner, you're a highly profitable employee whose value is constantly being chipped away.

The Freedom Metric: From Firm Asset to Independent Business Owner

The core issue is ownership. In the legacy model, you're seen as an asset — a highly productive revenue stream to be managed, acquired, or packaged for private equity.

The new metric for success is the freedom metric: Who controls the brand, the strategy, and the retained value?

For the entrepreneurial advisor, true independence means moving past the frustration and reclaiming your enterprise. It means partnering with a platform that is turnkey for operations, yet hands-off for strategy, allowing you to focus completely on the growth that matters: your own.

This is the essential shift from being a firm asset to becoming an enterprise owner.

KICKER: THE NEW GROWTH FRONTIER

Building a Business You Control

The new growth frontier isn't just about moving to an independent platform. It happens when you're granted the freedom to structure your business to maximize long-term equity.

If you're an entrepreneurial advisor, you deserve to build a legacy that's truly yours: A firm you control, a brand you own, and value you retain.

The single most important decision you can make is to unlock 100% ownership of your book and client data. This is the foundation upon which accelerated growth and seamless succession are built. You step out of dependency and into full command.

The Titleist Promise: No More Surprises

One of the greatest fears when considering independence is trading one set of hidden fees and complexities for another. Titleist was built to eliminate that fear with our No Strings Attached Advantage.

We understand the frustration of payout opacity. That's why we offer crystal-clear economics:

- Zero Payout Gymnastics: Full transparency in our revenue-sharing model means you know exactly what you're getting paid. Always.
- No Hidden Fees: We cover all core technology, software, and platform fees. There's no nickel-and-diming for the infrastructure you need to succeed.
- Full Fiduciary Freedom: We do not impose proprietary product mandates or sales quotas. Your recommendations are made in the best interest of your client, period.

"I spent close to a year evaluating different options. With Titleist, everything felt frictionless. Conversations were easy, I understood right away what they were trying to build, and it aligned with my own vision and values. That combination made the decision simple."

– Christian Amsberry, Titleist Advisor

Stability in a World of Constant Mergers

The threat of M&A is the destabilization it causes for successful practices. You shouldn't have to worry that your partnership will change overnight due to a corporate board decision.

Titleist offers stability. We are an employee-owned firm with zero private equity backing and no debt. We are not for sale. Our incentives are aligned with yours, and your long-term growth is our only priority.

Independence With Support

The greatest barrier to independence is often the perceived operational risk. But moving to independence shouldn't feel like building a second business from scratch. It should be a strategic shift where you focus on your clients and growth. And your partner handles the operational lift.

This is what we mean when we say Freedom With Support. Titleist provides a refined, three-phase roadmap, ensuring you execute a seamless business migration and are ready to accelerate growth on Day 91.

The Freedom Roadmap in Action

Phase I (Day 0–30): Vision, Due Diligence & Business Mapping

This phase is dedicated to strategic planning and minimizing uncertainty. It's an exploration of your business future, not a commitment.

- **The Vision Exercise:** We begin by working with you to map out your ideal business over the next 1, 3, 5, and 10 years. This process helps ensure that every subsequent decision—from custodian choice to tech stack—is centered on your specific, long-term goals.
- **Transparent Due Diligence:** We believe in opening the hood. Our initial conversations are strictly educational. We'll show you exactly how our revenue-sharing model works and offer access to references from advisors who've already made the move, giving you full clarity on your potential payout.
- **Business Analysis & Formation:** We leverage proprietary insights, including the Titleist AB Client Segmentation Analysis ™, to understand your practice deeply. We help coordinate legal guidance, entity formation, and office space, while our in-house compliance team helps keep your transition safe and compliant from the outset.

Phase II (Day 31–60): Infrastructure Build and Integration

Once the vision is clear, Phase II focuses on building your tailored, next-generation operational infrastructure. This is where the turnkey operational support shines.

- **Custodian & Technology Vetting:** We arrange private demos with major custodians (Schwab, Fidelity, Raymond James, LPL, and Altruist). Simultaneously, we help you vet best-in-class technology tools—from planning software (Right Capital, MoneyGuidePro, eMoney) to CRM (Wealthbox) and portfolio reporting (Black Diamond, Addepar). We don't mandate. We build a system tailored to your business goals.
- **Navigating the Complexities:** Transitioning requires navigating compliance, contracts, and data migration. Our team of seasoned operational and compliance professionals manages the majority of this process, freeing you to focus on your clients.

Phase III (Day 61–90): Launch, Transition & Accelerated Growth

The final phase is the execution of the physical move and the activation of your new growth capacity.

- **Seamless Transition & Continuity:** We utilize the Titleist Transition Dashboard™ to monitor every step, ensuring operational continuity and maximizing client retention. Our team has refined this process over dozens of individual advisor moves, guaranteeing a smooth landing.
- **Post-Launch Growth Activation:** Independence unlocks significant marketing options. We help you identify best-in-class tools that optimize for robust, forward-thinking AI-enabled resources (like Snappy Kraken) and immediately enroll you in the complimentary Titleist Practice Management Coaching program, which provides strategies for efficiently and confidently scaling your RIA practice.

KICKER: SCALE WITH PROOF

The Titleist Advantage

The true measure of a successful platform isn't the size of its marketing budget, but the success and satisfaction of its advisors. The Titleist Advisor Network is built for and measured by entrepreneurial momentum.

- Accelerated Growth: We are proud to be ranked #22 among the 50 fastest-growing RIAs nationwide. This metric is proof that our platform is uniquely equipped for scale, giving our advisors unlimited capacity for growth that is often throttled by legacy firms.
- Advisor Retention: Our partnership model results in real loyalty, demonstrated by our outstanding advisor retention rate. Advisors who experience our crystal-clear economics and comprehensive support simply don't leave.

Independence Without Isolation

True independence doesn't mean isolation. It means surrounding yourself with a network of high-caliber, like-minded entrepreneurial peers who are committed to long-term partnerships, not just quick stepping stones.

By joining Titleist, you become part of the TAM Mastermind. a collaborative environment where advisors share actionable insights and strategies for achieving accelerated growth. You benefit from shared experience, best practices, and a culture where your success is genuinely understood and prioritized.

Connecting the Dots: The Proof Is In the Momentum

You became an advisor to build a business worth owning, not to serve someone else's firm. The 90-Day Scale-Up Blueprint ensures you:

- Secure 100% ownership and maximize your equity value.
- Establish operational control and eliminate bureaucratic friction.
- Activate an accelerated growth plan with a proven partner.

“The results speak for themselves. Assets and revenue grew more than 50 percent within the first year. I have also been able to execute marketing initiatives I could not touch before. Work gets done faster, more flexibly, and with far more autonomy than I had in the past.”

– Christian Amsberry, Titleist Advisor

Ready to Find Your Freedom?

You have the ambition, the talent, and the client relationships. Now, you have the blueprint. Take the next, most crucial step in owning your future.

Ready to own your future? Book a confidential call to explore your next chapter.