

The Path to True Independence:

How Christian Amsberry Built a Practice His Way



Christian Amsberry was frustrated. He was tired of the bureaucracy and slow-moving technology at his firm, which limited his ability to serve his clients and grow his business. He wanted to build a practice that was truly his own. With the support of the Titleist Advisor Network, he found the freedom from bureaucracy he craved, resulting in a 50% increase in assets and revenue within his first year. This is his story.

“ I just felt stuck. I was frustrated because I knew I could do better for my clients, but I felt limited by the structure I was in. It was not about lack of effort, it was about hitting a ceiling and knowing there had to be a better way forward. ”

-Christian Amsberry, Founder, Concierge Wealth

Client Snapshot

Name:

Christian Amsberry

Firm:

Concierge Wealth

Location:

San Francisco, CA

Website:

concierge-wealth.com

The Challenge

Christian's practice is deeply personal. He helps women navigate their financial lives after losing a spouse. Christian wanted to provide a level of care that matched his mission, but his firm's rigid structure made it difficult. He felt like a small fish in a very big pond. Simple requests took weeks or even a year to get approved, leaving him unable to execute new marketing initiatives or adopt modern technology. He was tired of the politics, payout games, and backroom deals of legacy firms.

The Solution

Christian knew he needed a partner who would meet him where he was: experienced and capable, but skeptical of too-good-to-be-true promises. After a year of weighing his options, he chose Titleist, a platform built by advisors, for advisors.



Freedom from Bureaucracy:

Titleist provided a clear roadmap to independence. The platform offers back-office support and operational infrastructure, freeing him from administrative and compliance burdens so he could focus on his clients and growth.



A Clear Path to Scalable Growth:

He was able to run his business on his own terms, with access to turnkey operational support and integrated technology from day one. This allowed him to differentiate himself and unlocked the capacity to grow without red tape.



Your Business, Your Equity:

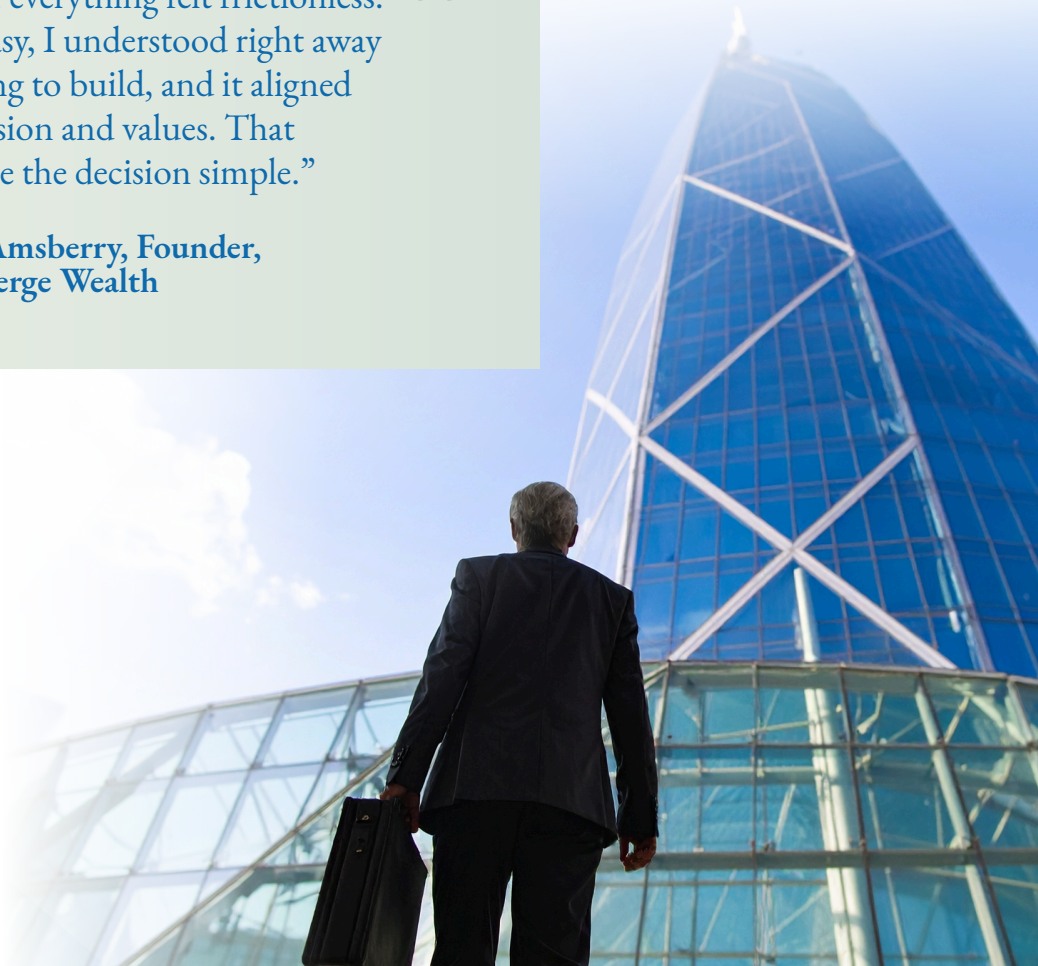
Titleist offers a transparent revenue-sharing model with no hidden fees, giving him 100% ownership of his book of business. He's now building his own legacy, not someone else's.

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“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.”

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—Christian Amsberry, Founder,
Concierge Wealth



The Results: A Newfound Freedom and Measurable Growth

Since joining Titleist, Christian has seen measurable improvements in his practice.



50%+ growth in assets
and revenue within
the first year.



Work gets done faster
with more flexibility
and far more autonomy
than before.



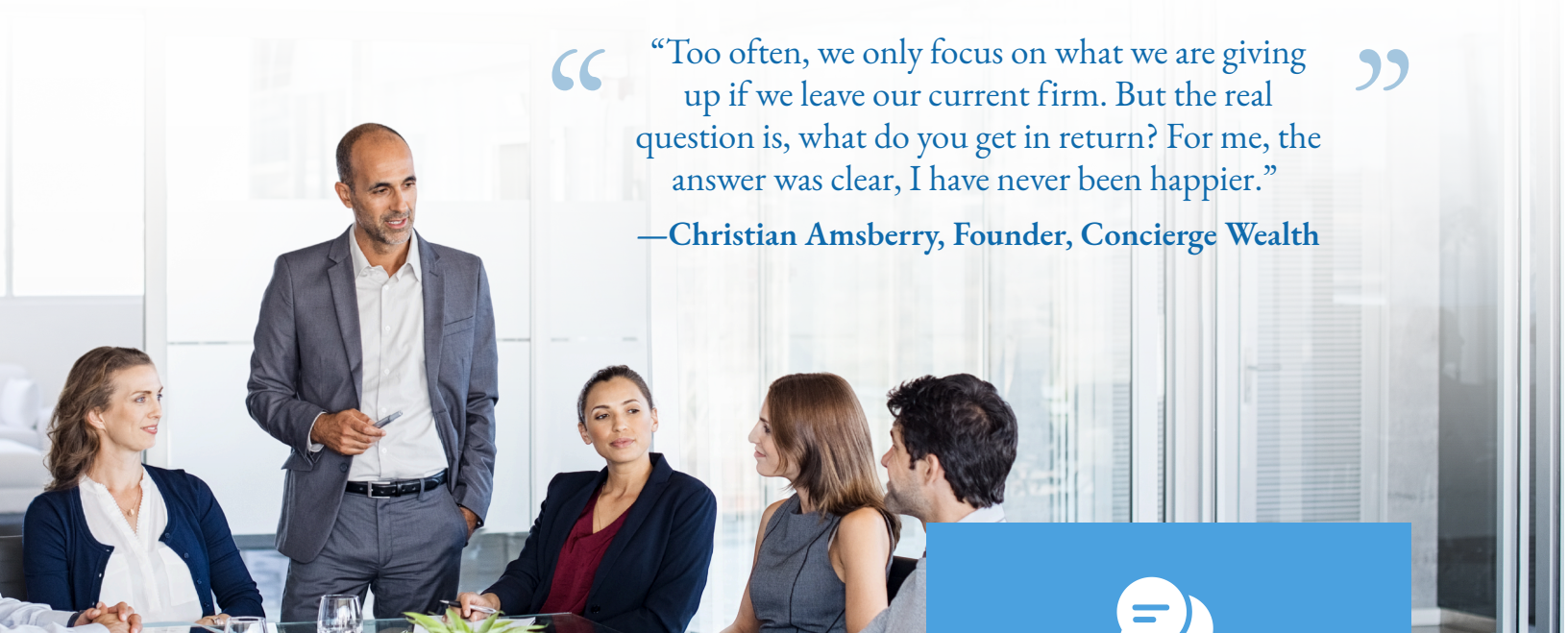
Executes marketing
initiatives that were
previously impossible.



“Too often, we only focus on what we are giving up if we leave our current firm. But the real question is, what do you get in return? For me, the answer was clear, I have never been happier.”



—Christian Amsberry, Founder, Concierge Wealth



About Titleist

At Titleist, we believe true independence isn't just about breaking away—it's about building something better. We provide a transparent, stable foundation so you can plan for the long term with confidence, knowing the firm you partner with will never be sold out from under you.



Ready to build a practice
on your terms?

**Book a 15-minute
discovery call to explore
your options.**