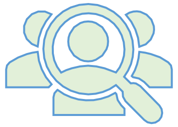
Strategic Plan – What Makes Us Different?

Unique and Proactive Approach with <u>Private Wealth Advisors and Wealth Teams</u>

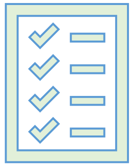
GLOBAL RECRUITERS SHORELINE

1. Discovery / Get to Know You
   - Acknowledge your urgency and timeline to find the perfect fit
   - Understand your business track record, your ideal culture, and Must-Haves



2. Review the scope with my team / Strategize With You
   - Understand and compare your target companies, decision-makers, transition plans, onboarding, etc.
   - Provide you with a high-level summary of our findings and our strategy

3. GRN Shoreline executes a business plan to introduce you to decision-makers at the firms that meet your Must-Haves
   - Advisor questionnaire to value, and business plan to transition, your business*



4. Interviews – coaching and debriefs
   - The goal is to get you interviews with high-value decision-makers at firms fitting your Must-Haves
   - I will coordinate the first phone/zoom call
5. Negotiate an offer
6. Communication & Decision
   - Keep in touch throughout the process

**critical step*

Areas of Specialization | *<u>It's All About The Perfect Fit!</u>*

GLOBAL RECRUITERS® SHORELINE

M&A with Financial Institutions | RIAs | Banks | Wealth Managers | Advisors looking for the perfect fit

- Teams joining a new firm
- Firms looking for new talent
- Advisors joining private wealth teams | RIA firms
- Succession planning
- Advisors seeking lead flow and referral opportunities
- Variety of business models and support structures
- Advisors looking for independence

GLOBAL RECRUITERS® SHORELINE

Financial Institutions | RIAs | Banks | Wealth Management Firms
Wealth Advisors | Private Wealth Teams

Why partner with GRN Shoreline?

Learn More

Schedule a meeting