A Partnership that Helps Optimize the Success of Investors and Advisors

SIMPLICITY WEALTH

Simplicity's wealth management platform helps financial advisors create successful outcomes for their clients and achieve their goals by delivering education, value, and partnership in the following ways…

- **Educate** clients and prospects on the importance of planning for, and helping to achieve financial security throughout each phase of one's life.
- **Differentiate** advisors' businesses in the marketplace by delivering distinctive value through proprietary planning instruments, sophisticated investment strategies, and leading products.
- **Modernize** business processes to help optimize scalability from prospecting and client acquisition to managing and growing client relationships.

5 Core Tenets of Simplicity Wealth

1. **Holistic Planning**
2. **Platform Flexibility**
3. **Investment Specialization**
4. **Integrated Technology Stack**
5. **Robust Team of Experts**

For more information and to learn how you can partner with Simplicity Wealth, please contact your Sunderland Group, Advisor Development Consultant.

800.373.9807