

Partner with Tandem



TANDEM
WEALTH ADVISORS

we'll get there together

Why Tandem?

Tandem is a rapidly growing fee-based financial services firm focused on helping clients develop and attain long-term financial goals. We understand from experience that it takes years of hard work to build an established client base. We also understand the challenges of being an advisor in a larger firm, bank or brokerage advisor with the requisite bureaucracy, financial products and confusing compensation structures that only impede an advisor's ability to truly serve his or her clients.

You know your clients and how their needs are evolving. We recognize that setting out on your own as an independent advisor is a daunting task. The benefits of transitioning to a firm with an established infrastructure and proven results are invaluable to your clients' experience. We are looking for advisors who wish to be part of something larger and are interested in a long-term business partnership – building equity as an active participant in a growing firm. Finally, larger clients are attracted to larger firms rather than solo practices.

Tandem offers a competitive compensation structure as well as an equity ownership track. Partnering with Tandem provides a way to lower fees for your clients while increasing advisor income.

We provide:

- Business and operational infrastructure
- Investment solutions with a proven performance record
- Cutting edge technology to enhance transparency and provide a higher level of client service and interaction
- A smooth transition process in moving existing clients to Charles Schwab
- Focus on a fiduciary standard of care and a "culture of compliance"
- Fee-only vs. commissions
- A competitive compensation structure as well as an equity ownership track
- A variety of financial planning and investment management solutions to help your clients succeed
- A strategic relationship with Charles Schwab Bank to provide an institutional trustee solution for clients in need of such services. Through this arrangement, Charles Schwab Bank acts as the institutional administrative trustee on trust accounts while Tandem serves as investment manager.

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Who Are We Looking For?

We are searching for advisors with an established, transferrable client base who want to be part of a team environment with a holistic focus on doing what's best for clients. Individuals with a willingness to collaborate will help continue to grow a successful business and maximize sustainability. Tandem thrives when working together with a diverse range of people with unique strengths and personal attributes.

We find great value in individuals who consistently and reliably take personal ownership of all aspects of their job. It is important that every member of the team cultivate their own motivation and bring the initiative to tackle the unexpected obstacles that arise in day-to-day business.

Along with above, we value individuals who:

- apply a positive, creative, and fresh-thinking approach to everything they do
- deliver what they promise and take responsibility for their actions
- understand the importance of working in teams
- want to have a tangible impact by turning one's passion into action
- have a pragmatic mindset and an appreciation for the challenge of sustainability

Who We Are

We have organized our firm around a strong commitment to client education and service, reliability, timely communication and results. We believe investment managers must be honest, intelligent and unemotional in regards to decision making. Adhering to a clear philosophy and repeatable process, we strive to deliver consistent risk-adjusted returns at a low-cost over a complete market cycle in both up and down markets.

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Our clients' assets are held at Charles Schwab & Company, Inc., a top-tier brokerage and banking corporation. All accounts are held at Charles Schwab in the client's name, ensuring clients remain in complete control of their own assets while Tandem directs the investment management.

Our traditional yet forward-thinking investment discipline combines qualitative research, quantitative analysis, risk management, relative valuation and best-in-class technology to construct diversified client portfolios for individuals and families with $300,000 or more in investable assets.

What To Do Next

We are happy to answer any questions you may have. Feel free to call or email any time. We look forward to hearing from you.

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