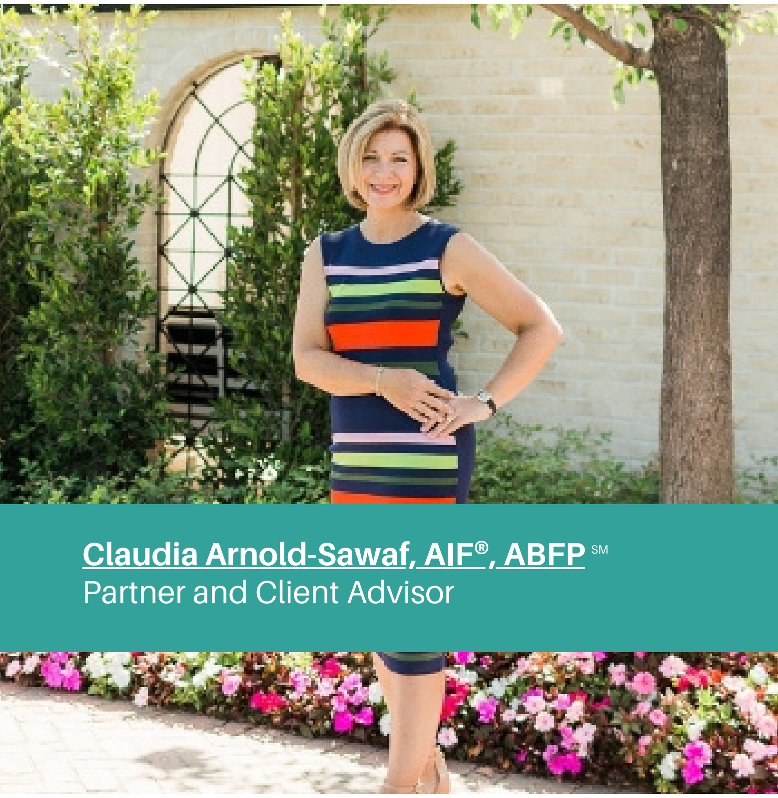
MISSION WEALTH®

Your goals. Our mission.

CASE STUDY
ADVISOR PARTNERSHIP



Claudia Arnold-Sawaf, AIF®, ABFP SM
Partner and Client Advisor

ADDING VALUE, BEING VALUED

Sawaf Financial LLC owner Claudia Arnold-Sawaf was outgrowing her solo practice in Scottsdale, AZ and Irvine, CA. Focused on high net worth families and physicians with privately owned practices, the complexities of running her own business arose. Since joining Mission Wealth and through the challenging market environment, she has grown her practice and is supported by the collective expertise of her team.

OVERVIEW

Claudia Arnold-Sawaf translates her earliest experience in global hospitality to 20+ years of providing world class service and personal care to help her clients achieve their visions and goals. As a Partner and Advisor at Mission Wealth, Claudia serves private wealth clients and private foundations. She owned and operated her own fiduciary planning firm but was outgrowing her practice and trying to navigate the complexities of running her own business. In 2019, she joined Mission Wealth as an advisor on our Paths to Partnership, to provide even greater resources and a broader team of experts to her esteemed clients. In January of 2022, Claudia joined our ownership group as the 19th equity partner of Mission Wealth.

PRE-MERGER PAIN POINTS

- Needed help with her firm's growth.
- Could benefit from offering a more robust investment solution (i.e. Alternatives, Socially Responsible Investments, someone else to do the trading, rebalancing, tax loss harvesting, reporting, due diligence).
- High net worth clients want to know there is a strong succession plan in place, so if you are competing for a new client, this client might prefer an advisor with a team.

MISSION WEALTH QUICK FACTS

$4.8B	2,100	22	100%	$65M	21%
Billion Assets Under Management	Client Advisory Relationships	Offices Located Across the U.S.	Employee-Owned and Operated	Diamond Team Growth Per Year	Annualized Growth in the Past 10 Years

"I have increased my value to my clients, through service and enhanced resources. I could not have grown at this speed on my own."

ACQUISITION RESULTS

GROWTH

- Expanded client base with ideal fit clients.
- Increased income and equity growth.

RELEVANCE

- Staying relevant amongst industry changes.
- Ability to offer new and more services to clients to enhance the client experience.

FULFILLMENT

- Has a sense of pride in who she works with and their reputation in the community.

SUPPORT

- Able to now offer a more robust investment solution.
- Para-planner support.
- Access to the best technology stack and team.
- Marketing team to help with business development, collateral, and communications.

CULTURE

- Award winning firm.
- Great benefits.
- Bright and fun, supportive people to be around.

LEADERSHIP

- Female representation throughout the firm and in leadership.
- Path to Partner success.

PARTNERSHIP OPPORTUNITIES

Mission Wealth is seeking aligned wealth management firms and advisors with the right cultural fit to expand our growing nationwide presence. There are many benefits to joining our firm and we want to make the transition seamless for you, your team and your clients. If you are ready to explore your fit at Mission Wealth, we would be happy to meet with you to discuss the opportunity.

Seth Streeter (805) 886-2247 missionwealth.com/opportunity sstreeter@missionwealth.com