MISSION WEALTH®
Your goals. Our mission.

CASE STUDY
ADVISOR ACQUISITION

Jeff Avila, CFP®
Partner and Client Advisor

WHAT IF YOU COULD FOCUS ON WHAT YOU DO BEST?

As a Senior Advisor in Santa Barbara, CA, Jeff Avila was drawn to Mission Wealth for their great reputation and demonstrated growth channels. Seeking a support team and opportunity for personal advancement, he joined the firm in 2018 and became a partner, now leading the U.S. Mountain West region advisory team and business development efforts.

OVERVIEW

Jeff Avila has over 20 years of experience in the investment management industry. Before joining Mission Wealth in 2018, he was a Vice President, Financial Consultant in the Private Client Group at Fidelity Investments. He later became a Senior Wealth Advisor with a boutique RIA located in Santa Barbara, CA. After joining Mission Wealth, he has gained a support team, the potential to grow, and his clients are thriving with additional services and expanded investment offering.

PRE-MERGER PAIN POINTS

- Lack of support to keep up with daily tasks
- Wanted a more robust investment offering for clients
- Anticipated a more purposeful career
- Ability to better serve and acquire more clients

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 feel that I have a strong team supporting me and that I can give my clients so much more than I was able to give at a big firm; personal touch and more service offerings. I am so grateful now to be able to focus on what I'm best at versus wearing every hat in the background, including doing many jobs that I didn't enjoy doing.*

ACQUISITION RESULTS

GROWTH

- Became a partner in 3 years through Path to Partner plan.
- Grew practice and expanded client base.
- Increased income and partner equity growth.
- Personal growth through expanded industry knowledge.

RELEVANCE

- Can now stay relevant amongst industry changes.
- Ability to offer new and more unique services to clients.
- Inspired Living platform to help clients live a more fulfilled life.

SUPPORT

- Personal trading burden was eliminated.
- Access to the best technology stack and team.
- Marketing team to help with business development, collateral, and communications.
- Operations and Client Services team to help with administrative tasks.

CULTURE

- Part of an award-winning firm.
- Great benefits.
- Bright and fun, supportive people to be around.
- Has a sense of pride in who he works with and their reputation in the community.

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.

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