



Jorie Pitt, CFP[®], CeFT[®]
Client Advisor

DO YOUR PEOPLE WEAR MANY HATS AND SEEK SUPPORT?

As a Senior Advisor and Partner at AHC Advisors in Chicago, IL, Jorie Pitt was attracted to Mission Wealth for their abundant support departments. Motivated by the opportunity to join a great culture and team with structured departments, Jorie knew she would now have time to do more of what she loved - serve clients.

OVERVIEW

Jorie Pitt was a minority owner and partner at RIA firm AHC Advisors. AHC was a boutique style Financial Planning and Wealth Management firm, but also had an institutional arm to the business that was dedicated to pension fund consulting. Jorie serviced the individual Financial Planning and Wealth Management clients during her time at AHC. Their team of three was efficient and highly processed, but they were quickly coming to the point where each person was reaching their capacity. They needed to begin expanding, which would mean additional hiring and evolving their processes as they started to grow, or they needed to consider joining a larger firm. After much discussion and consideration, they decided to move forward with an acquisition. Mission Wealth was chosen for many reasons, but their dedicated support departments that could immediately start to pull some of that work off of their plates was a big factor. Jorie and her team now have more time to concentrate on what they do best and enjoy doing most which is working with clients.

PRE-MERGER PAIN POINTS

- Each team member had many responsibilities that took time away from their primary role.
- Torn between expanding AHC or joining another firm in order to obtain support teams.

MISSION WEALTH QUICK FACTS

\$4.8B

Billion
Assets Under
Management

2,100

Client Advisory
Relationships

22

Offices
Located Across
the U.S.

100%

Employee-
Owned and
Operated

\$65M

Diamond Team
Growth Per Year

21%

Annualized
Growth in the
Past 10 Years

“ A lot of tasks have been reduced; the investment team handles the trading, the operations team handles the paperwork, the marketing team handles events and communications, HR, office management, pretty much everything. There’s also compliance which we were happy with as it takes a lot of time and changes.”

ACQUISITION RESULTS

SUPPORT

- Marketing, Operations, Compliance and Technology departments to absorb the extra work.
- Access to a good technology stack and team.
- Collaboration and wisdom is shared, with different levels of cultured, experienced, geographically-located advisors.

INTEGRATION

- Acquisition process went relatively smoothly and quickly, with integration complete in under 6 months.
- Client concerns of personal touch being lost during an acquisition was alleviated by the consistency of client base being served by their same advisor.

CULTURE

- Positive culture for both employees and clients.
- Joined a firm with a primary focus on it's people.
- A management team that listened and collaborated with their needs during and after the acquisition.

GROWTH

- Retained existing clients, which was the top goal during the integration process.
- Ability to take on more clients with support of firm departments doing the extra work.



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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