MISSION WEALTH®

Your goals. Our mission.

CASE STUDY

FIRM ACQUISITION

Pete Woodring, AWMA®
Client Advisor

OFFER YOUR CLIENTS A MORE **ROBUST, SCALABLE PLATFORM**

As a RIA owner in Salt Lake City, Utah, Pete was drawn to Mission Wealth's robust service offering and support team structure. Motivated by the opportunity to offer his clients a more comprehensive service model and process, he decided to merge with Mission Wealth in 2019.

OVERVIEW

Pete Woodring has been in the advisory business for over 22 years and started with one of the oldest wealth management firms in the country, US Trust, before starting his own practice. He developed a strong portfolio management foundation at US Trust and deep planning expertise while he partnered with his father at Cypress Partners. During his time playing professional soccer prior to starting in the advisory industry, he learned the importance of discipline and teamwork, which is instilled in his process as he assists clients in achieving their dreams. Today his clients are the beneficiaries of a larger, more structured, efficient and robust service model.

PRE-MERGER PAIN POINTS

- Wanted to enhance client outcomes and overall client experience.
- His time was diluted due to being pulled in different directions, with a lack of paraplanner support .
- Needed a more scalable, robust platform .

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

> *"My clients were thrilled to join Mission Wealth and within the first quarter they felt a positive impact of being part of a larger firm with more layers of resources, support, and combined expertise and to this day I still have clients thanking me for making the move."*

ACQUISITION RESULTS

INTEGRATION

- Was given great guidance and support prior to and during the transition.
- A seamless integration process allowed for a smooth transition for his clients.

RELEVANCE

- Staying relevant amongst industry changes.
- Can now more efficiently deliver white glove service, a more robust service model, and scalable platform.

SUPPORT

- Para-planner support allowed him to offer more white-glove service to his clients.
- 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.

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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