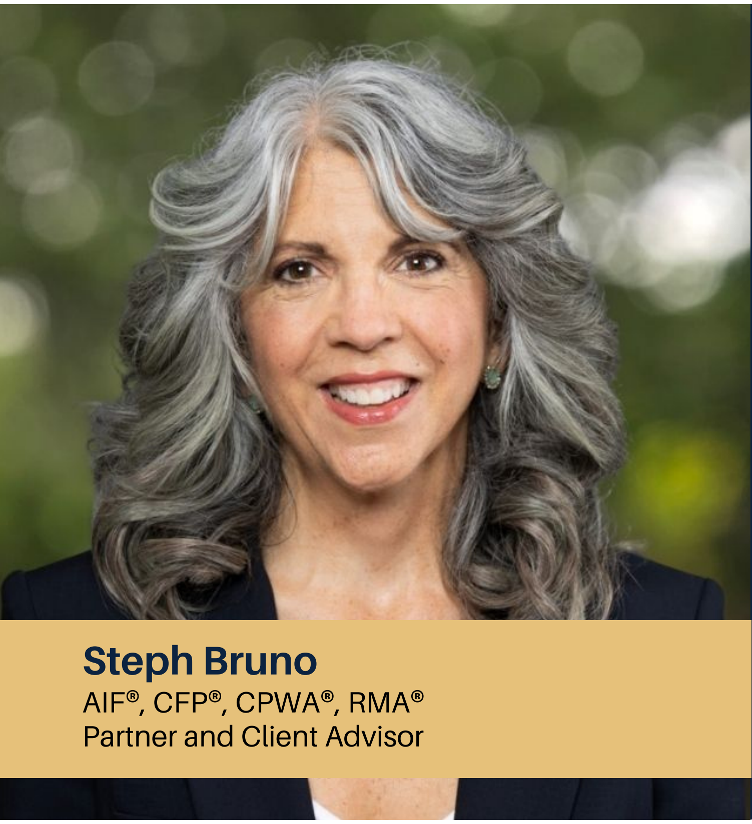
MISSION WEALTH®
Your goals. Our mission.

**CASE STUDY**
FIRM MERGER



**Steph Bruno**
AIF®, CFP®, CPWA®, RMA®
Partner and Client Advisor

# INSPIRED LIVING, INSPIRED WORKING

*As the owner of Sea to Peak Financial Advisors in Seattle, WA and Denver, CO, Steph Bruno was drawn to Mission Wealth's ability to deliver more than just plans and investments to clients. Today she is able to provide enhanced client experiences that are more fulfilling and help clients use their money to improve their lives, the lives of their families and their communities.*

## OVERVIEW

Stephanie Bruno founded Sea to Peak with the vision of delivering goals based planning and investment advice to her clients that was both comprehensive and caring but that also touched on aspects of the client's life beyond their balance sheet. As Sea to Peak entered its tenth year, Steph was looking to join a firm with more resources and dedicated support teams that also shared her vision of bringing meaning to a client's financial life. From her Seattle and Denver hubs, Steph is passionate about serving her clients and finding unique planning opportunities that help her clients achieve their broader life goals. Her process combines a focus on the joy and inspiration in life while tailoring more traditional investment and financial planning solutions.

## PRE-MERGER PAIN POINTS

- Wanted to continue to provide the utmost in client service to her executive and professional client base which required more support as her client base grew.
- Looked to reduce the complexities of running her business.
- Wanted to plan for succession for the future, but was still interested in growing until then.

## 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 am honored to merge with and be an owner in an organization that is dedicated to providing caring advice to empower people to live their life's dreams. This combination of care and expert technical and investment advice will benefit my existing and future clients.*

## PARTNERSHIP RESULTS

### GROWTH

- Ability to onboard more clients.
- Grew client base.
- Amplify equity growth.
- Diversified firm growth.

### RELEVANCE

- Staying relevant amongst industry changes.
- Client service delivery tracking - ability to monitor and report on client deliverables.

### FULFILLMENT

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

### SUPPORT

- Para-planner support.
- Ability to offer more high-touch communications.
- Ability to focus more on clients, not wearing as many hats.

### CULTURE

- Retained her team when she moved to Mission Wealth.
- Employee-owned firm.
- Working with high integrity people who support everyone across the firm.

### LEADERSHIP

- Women in leadership and partner positions.
- Joined firm as an owner on day one.

## 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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