

TITLEIST FREEDOM ROADMAP™

VISION EXERCISE

We take you through a 'whiteboard' session to map out what your ideal business could look like over the next 1, 3, 5 and 10 years. Once your vision is cast, we leverage our experience to help design your firm with your goals at the center of the decision making process.

BUSINESS FORMATION

We help you with several important aspects of your business set-up including the sourcing of legal guidance, entity formation and office space. Our in-house compliance team will help keep your transition within the boundaries of what is compliant during a move.

TECHNOLOGY DUE DILIGENCE

We will help you vet the best-in-class technology tools such as: [Right Capital](#), [eMoney](#), [MoneyGuidePro](#), [Morningstar](#), [YCharts](#), [Nitrogen Wealth](#), [Asset-Map](#), [FP Alpha](#), [Redtail](#), [Wealthbox](#), [Holistiplan](#) and [Black Diamond](#). Every practice is different so we want to build the system that helps you achieve your business goals.

TRANSITION PHASE

Our team of seasoned operational and compliance professionals help ensure a smooth transition. *The Titleist Transition Dashboard™* will help you monitor the progress of your move.

BUSINESS ANALYSIS

To better understand your business we leverage our proprietary *Titleist AB Client Segmentation Analysis™*, Position Analysis and Profitability Report.

CUSTODIAN DUE DILIGENCE

We set-up private demos with the major custodians: [Schwab](#), [LPL](#), [Fidelity](#), [Raymond James](#) & [Altruist](#).

MARKETING

Once on the independent side of the industry, your marketing options significantly open up. It can be overwhelming. We help you identify best-in-class tools that fit your business. Examples: [Snappy Kraken](#), [Lead Pilot](#).

PRACTICE MANAGEMENT

The *Titleist Practice Management Coaching* program is complimentary for advisors. Our proprietary Financial Planning & Investment System, The *Titleist Resilient Method* is available for all advisors to use or brand as their own.