

PER STIRLING

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PER STIRLING ADVANTAGES

Independent Culture:

- A truly independent entrepreneurial culture.
- Hybrid structure with multiple advisory custodians and broker-dealer OSJ.

Generous Compensation:

- High payouts (without haircuts) and profit sharing for top advisors.
- Group health and retirement benefits.

Exceptional Support:

- Assistant assigned to every advisor.
- Furnished office, computer, technology infrastructure, and phone systems for all “partner level” advisors.
- Comprehensive compliance and reporting services for all advisors.
- Cutting-edge, cloud-based technology platform, CRM, portfolio management, and financial planning software provided.
- Advisor-friendly contract that specifies that our associates own their clientele.

OUR MISSION

Our goal is to take the burden of and responsibility for compliance, administration, billing, reporting and running a business off the shoulders of our associated advisors, thus leaving them free to serve the needs of their clients and to grow and develop their practice in a truly fiduciary environment.

Please visit our web site www.perstirling.com or call our office to learn more about Per Stirling and its services. We look forward to the opportunity to tell our story.



Per Stirling Home Office

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PERFORMANCE • PERSPECTIVE • PER STIRLING



DISCOVER THE PER STIRLING ADVANTAGE



HIGH PAYOUTS
•
EXCEPTIONAL SUPPORT
•
INDEPENDENT CULTURE



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A FIDUCIARY CULTURE



Other associates, who have previously owned their own RIA firms, selected Per Stirling because they found significant advantages and scale in working in a team environment, where all compliance, administration, billing and reporting functions are handled for them.

“Per Stirling provided me with a fiduciary, client-first culture, continued independence, a compliance infrastructure, the ability to work with another CFP® practitioner on a succession plan and much more.”

— Mary Voll Miller, CFP®

Still other advisors have selected Per Stirling in order to accommodate their desire to start transitioning towards retirement, or because of their need for a contingency plan, in the event that something happens to them.

A PROVEN WEALTH MANAGEMENT FIRM

If you're a financial advisor who is frustrated with continued payout reductions, support problems and conflicting corporate interests that prevent you from servicing your clients properly, Per Stirling is the financial partner for you.

“I was looking for an Austin-based hybrid RIA/BD firm that truly had the resources, business model and commitment to help me take my business to the next level. Per Stirling offers the entire package, including competitive compensation, full administrative and back office support, an experienced transition team, and an environment of like-minded professionals where you can thrive.”

— Ryan Joyce, CFP®, CPA

Our associates have selected Per Stirling as their financial partner for a variety of reasons. Some really like Per Stirling's independent business model, its attractive compensation package, and its client-first approach.

UNCOMMON AMENITIES AND SUPPORT

Per Stirling combines the amenities, support and technology that is normally only available through the national wirehouse firms, with the type of generous compensation structure that is only available through independent firms.

“When I first began discussions with Per Stirling, I already owned a successful RIA firm that I had started in 1997. However, I soon discovered that it made sense on so many levels to take advantage of the economies of scale available through a larger firm. Since joining the Per Stirling team, I have been very pleased with all aspects of our personal and business relationship.”

— Teri Bergstrom, CFP®, CLU

Per Stirling supports its associates through all stages of their career, starting with our superior on-boarding and transition process, continuing with exceptional support and the opportunity to participate in the success of the firm and, at the advisor's discretion, concluding with the development and implementation of a succession plan.