

WHY ADVISORS CHOOSE DIAZO



www.diazo.com

DIAZO
FINANCIAL INDEPENDENCE
BY DESIGN

WHY DIAZO

Culture

Diazo is an impact-oriented organization designed to help financial professionals re-define their relationship with both client and firm. We believe that the key to better advice is providing a more supportive environment for the financial professional we serve. Our business model was created by advisors – for advisors.

We strive to provide a workplace where questions are welcomed, and education isn't just something you do to keep a license. Ultimately, we want to make sure advisors feel the support of a community working towards a common goal. Like most registered investment advisors, we provide quality investment tools, state-of-the-art technology, and talented advisor support teams. But the most important tool we use to maximize outcomes for advisors and clients alike is listening.

Clients of Diazo Enjoy Bespoke Services

Diazo was created as a place for advisors to thrive. A place for those who are the best of the best and believe that growing their relationships is at the core of growing their business; that is at the core of our business model: helping you grow your business. We understand that financial planning isn't transactional, it's relational.

At Diazo, we believe that to build wealth and wellbeing for you and your clients, you need a place where you can create authentic connections and build deep relationships with your clients and their families. We provide services and support with that in mind. And, we encourage clients to reach out to their advisor regarding anything that involves a dollar- or percent-sign – anything from buying their next car to business entity construction, and a lot in between. That belief is why we've designed the suite of bespoke services we offer to clients – essentially a "one-stop shop" for all of their financial wellness needs.

As a Diazo advisor, you have access to our exceptionally-curated network of trusted partners – estate planning attorneys, certified public accountants, luxury insurance brokers, and more – all of whom we have vetted and trust to provide the premium customer service experience our clients deserve and come to expect. In addition, Diazo has crafted special Lifestyle & Wellness ServicesSM – a growing list of amenities including car and tech buying services, medical services, and a Diazo Founders Card – for our Private Client Group.



Marketing

We understand a dedicated and professional marketing team is an essential asset for financial advisors. Our team of professionals is available to you from your transition and on throughout your growth to assist you with website and social media design; deliver fully branded Diazo marketing materials; provide lead generation; offer memorable, experience-oriented event planning and much more.

Technology/ Resources

Our goal is to give you the best choices possible for when, where, and how you want to work. Diazo offers a full Microsoft suite that provides the ability to meet clients virtually and conduct all communications through Teams and video. All technology is provided for advisors, including planning and billing software.

Other resources include:

- DocuSign for 99% of all traditionally required client forms
- Full Portfolio Risk Analytics using Riskalyze
- Billing, Statementing, Client Portal, and Book Analytics, powered by Advyzo
- Full CRM supported by HubSpot
- Access to manage active retirement accounts including 401K, 401A, 403b, and 457s utilizing Pontera (formerly FeeX)
- Premier custodian relationship with Charles Schwab

Solutions

Our Operations and Compliance support teams are solution-oriented and ready to:

- Provide the necessary tools to manage your business
- Support your cash handling and transaction needs, including trading, rebalancing and portfolio construction, so you can focus on your client, not the day-to-day nitty-gritty of their account
- Help you navigate the complex regulatory environment to see what's possible

Our on-staff CFA® Charterholder is ready to help with:

- Model Portfolio Construction
- Portfolio risk identification and management

Your Business is Your Business

All relationships you bring to or develop while you're with Diazo are yours. We're probably not your first RIA but we hope to be your last. But, if you should decide to leave, we will never restrict your ability to work with your clients or transfer their accounts.



“ Our business model was created by advisors – for advisors.

Joining Diazo

We're not going to lie, changing firms is always a bit of a challenge but, with our planning and experience, we've proven we can make it as easy as possible. We focus on protecting your business and welcoming your clients with a well-orchestrated transition.

Our dedicated Onboarding Team pledges to ensure you have the comprehensive resources necessary to make the transition process as smooth and as fast as possible. Our 60-point Transition BlueprintSM lets us monitor every aspect of your business during your move – letting you focus on staying connected with your clients.

And our support doesn't stop once your transition is complete. You can expect us to stay in touch on an ongoing basis to make sure you have everything you and your clients need to support both your wellbeing.

Communication

As we mentioned before, Diazo was built by advisors, for advisors. The individuals on our team have been in your shoes and supported financial professionals and their clients for decades.

We don't operate in silos, when we say you have a "team" supporting you, that means everyone, from our support staff to our owners. We're all here to help you grow your business, not talk to you through a go-between or gatekeeper.

We'll communicate with you honestly and directly and we'll encourage you to do the same. To support that promise, you'll have all of our cell phone numbers so you can call us anytime – day or night.



CONTACT US

Las Vegas

2518 Anthem Village Dr, Suite 104
Henderson, NV 89052
702.745.1800

Myrtle Beach

309 Carolina Farms Blvd
Myrtle Beach, SC 29579

www.diazo.com

DIAZO
FINANCIAL INDEPENDENCE
BY DESIGN

