

## WHY ADVISORS CHOOSE DIAZO

## Culture

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Diazo is an impact-oriented organization designed to help financial professionals re-define their relationship with both client and firm. 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.

## Clients Enjoy Bespoke Services

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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 Services<sup>SM</sup> – a growing list of amenities including car and tech buying services, medical services, and a Diazo Founders Card – for our Private Client Group.

## Marketing

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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

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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.

## Your Business is Your Business

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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.

## Joining Diazo

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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. Our 60-point Transition Blueprint<sup>SM</sup> lets us monitor every aspect of your business during your move – letting you focus on staying connected with your clients.

## Communication

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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. 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.

