



Featured Articles About Securities America



Protecting Your Relationships with Business Owners, Affluent Clients

Having access to niche services, even if used infrequently, can help advisors keep competitors away from key clients Using services like initial public offerings and secondary offerings, mergers and acquisitions counsel, and making markets for clients' less liquid assets may be rare for most financial advisors. But when high net worth and business owner clients want and need such services, having that access can be critical to asset retention and growth for the advisor's practice. "Any time an advisor has a client with a unique need, even if infrequently, the advisor wants the ability to help solve that problem for..."

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More for Your Money

In September 2011, advisor David Winston left his office for the road trip of his career. Winston had just closed the deal to acquire the financial practice of an advisor in Dallas, and the two had 30 days to visit Winston's 60 largest new clients before the seller officially retired. That initial round of face-to-face visits, followed by second visits within the first six months, helped Winston retain more than 90 percent of the acquired book of business, and since has brought him dozens of referrals from those clients. Although the transition happened quickly, the seller smoothed the way for...

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On-Demand Content Gives Advisors Coaching When They Need It

Time and money can often be barriers to advisors getting the training and coaching they need to grow their business. Individualized programs that can be scheduled around the advisor's business may come with a high price tag, while group webcasts and conference calls may not fit into an advisor's busy day. Top industry coaching and training programs have recognized the Catch-22 and broadened their delivery approaches to give advisors the guidance they need, when they need it, at an affordable price while retaining the accountability advisors need. "Coaching is adapting to the lifestyle of advisors," said Kirk...

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Securities America's CONNECT! magazine contains articles on the latest industry trends and strategies.

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Financial advisors joining Securities America have a variety of choices.

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Financial advisors can compare Securities America versus other types of B/Ds.

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Advisors joining Securities America receive personalized transition support.

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Securities America Bankers Conference



Forty bank advisors, presidents and CEOs from across the U.S. joined Securities America key home office staff and top industry speakers for the inaugural Bankers Conference April 28-29. Attendees networked with peers, shared best practices and learned more about how to take full advantage of their bank's investment program.

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Omaha-based advisors with more than 30 years of experience join Fortress Wealth

May 28, 2014

LA VISTA, Neb. - May 28, 2014 - Thomas Kerins and Debra Hendrickson of Omaha, Neb., have joined Fortress Wealth Advisors, which opened mid-January. They are the first team to join founders Dana and Curren Webb, whose firm now manages more than \$200 million in assets. "Seeing the growth..."

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Securities America Adds Team with \$75 Million in ...



Pair joins United Advisors new hybrid office

May 14, 2014

LA VISTA, Neb. - May 14, 2014 - Advisors Jonathan Lifschutz and David Reed have joined Securities America, a wholly owned subsidiary of Ladenburg Thalmann Financial Services Inc. (NYSE MKT: LTS). Lifschutz and Reed, who together managed \$75 million in client assets, joined the United Advisors Priv...

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Securities America Grows Recruiting Team...



Triemstra brings 20 years of financial services experience

May 07, 2014

LA VISTA, Neb. - May 7, 2014 - Securities America, a wholly owned subsidiary of Ladenburg Thalmann Financial Services Inc. (NYSE MKT: LTS), has hired Joel Triemstra to the position of regional director, branch office development. Triemstra's addition to the team will help Securities America mana...

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Our e*Office Advantage and e*Office Mobile offer advisors industry-leading abilities to serve clients' needs anytime, anywhere.

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