



You Define What's Next,  
Together We Create A Path Towards It.

## Insights about ICG *next*

As a multi-generational firm, ICG *next* is distinctly positioned as the partner of choice for financial professionals.

Whether one is embarking on a career within the financial services industry, is considered a "mid-career" financial professional or a seasoned, experienced professional seeking a succession solution, ICG *next* demonstrates the organizational capacity, maintains the administrative support and boasts a collection of innovative, proactive and holistic strategies & procedures to shape your future - what's "next."

There are powerful and profound trends unfolding in the financial services industry, seismic changes that will impact our clients, their families, our industry and ourselves - we've developed a set of strategic plans to capitalize on them and are both committed and focused on execution of our strategic plans to ensure that ICG *next*, it's advisors and staff remain valuable, relevant and sustainable in an ever evolving industry & world.

At ICG *next*, we are clear on where we're headed and welcome exploring a strategic relationship.



## Professional Credentials

AIF®, CAIA®, CFP®, ChFC®, CIMA®, CIS®, CLTC®, CLU®, CMFC®, CRPC®, RICP®

The financial professionals affiliated with ICG *next* demonstrate extensive professional credentials & industry experience - ensuring the firm is strategically positioned to remain relevant & valuable for generations to come. In turn, the professionals associated with the firm can rest assured of sustainable career regardless of how the financial service industry evolves.

- *Barron's Magazine* - Top 1200 Advisors (Nationwide)
- *Forbes Magazine* - Best in State (New Jersey)
- *New Jersey Monthly* - Five Star Wealth Manager
- *Registered Rep Magazine* - Top 100 Independent Advisors (Nationwide)
- *Financial Times* - Top 400 advisors (Nationwide)



## Discover the advantages with ICG *next*

- Advisor retains ownership in clients brought to, and sourced at, ICG *next*
- Opportunity to receive additional compensation by servicing ICG *next* clients
- Opportunity for assistance with business development and growth inclusive of practice merger, equity and acquisition initiatives
- Opportunity to hold periodic marketing events paid by ICG *next* - planned with ICG *next*'s administrative and wholesaler support
- Opportunities to participate in ICG *next*'s client appreciation events
- Deeply discounted managed account fees negotiated by ICG *next* with LPL Financial
- ICG *next* pays broker-dealer expenses (ie. registration & licensing fee's, Errors & Omissions coverage, technology fees and ticket charges)

## Explore the Opportunities

- Opportunity to participate in ICG *next*'s succession planning process
- Assistance with complex client cases and/or financial planning strategies and solutions
- Advisor's professional bio included on ICG *next*'s website
- Advisors benefit from ICG *next*'s strong community presence and social media marketing
- Opportunity to participate in ICG *next*'s charitable endeavors

## You Have Access

- Access to experienced, knowledgeable managing partners for mentoring/coaching
- Access to interns through ICG *next*'s internship program
- Access to professionally prepared portfolios
- Access to a wide variety of wholesalers
- Access to support staff provided by ICG *next*
- Access to ICG *next*'s professional network (i.e. property & casualty, mortgage, legal and accounting professionals)

## ICG Resources for Success

- Advisor will be provided with a laptop, office telephone, office technology, office supplies, and subscriptions to financial news and research
- Access to a fully furnished office within ICG *next* offices

The foregoing do not constitute a contract or promise by ICG but are intended to illustrate the full-range of benefits available based on the individuals position and/or performance at ICG and at ICG's sole discretion.



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