



# Who Thrives at Concorde?

Our ideal financial professional fits seamlessly with our culture - an independent business owner who values the freedom to build their practice, backed by the experience, resources and support of a dedicated home office team.

# Finding the Right Fit

At Concorde, we believe the best partnerships begin with shared values.

We're proud to support financial professionals across the country, but we've never believed that bigger is better. Instead, we've built a firm where relationships matter, collaboration is encouraged and every advisor has access to the people, resources and support they need to grow. That's why we're intentional about partnering with financial professionals who value integrity, embrace collaboration and are committed to continually strengthening their practice.

The financial professionals who thrive here tend to have a few things in common:

## ENTREPRENEURIAL MINDSET

Our financial professionals are focused on growing their business, exploring new opportunities and planning for the future. They value the independence to run their practice their way, supported by a firm invested in helping them succeed.

## PUTS CLIENTS FIRST

They build trust by putting their clients' interests first, providing thoughtful guidance and fostering long-term relationships rooted in transparency.

## VALUES INTEGRITY

They understand that integrity and compliance go hand in hand. Rather than viewing compliance as an obstacle, they see it as an important part of protecting their clients.

## ARE ENGAGED

They value communication, collaboration and the shared commitment that makes strong partnerships successful. They recognize that meaningful growth comes from working together.



# Why They Choose Concorde

Financial professionals who choose Concorde aren't looking for a firm that simply processes paperwork. They're looking for a partner that's invested in helping them build a stronger business.

## EXPERT SUPPORT

Our experienced teams across compliance, due diligence, operations, technology and marketing work alongside financial professionals every day, providing the support they need to stay focused on serving their clients.

## COMPREHENSIVE CAPABILITIES

Through our integrated broker-dealer, RIA and insurance platform, financial professionals have the flexibility to deliver comprehensive solutions as their clients' needs evolve.

## BOUTIQUE SERVICE

We believe accessibility matters. Our leadership team is approachable, our service is personal and relationships remain at the center of everything we do.

## A CULTURE OF PARTNERSHIP

We believe success is built together. That's why we foster collaboration across our home office, our financial professionals and our strategic partners, creating an environment where everyone is invested in helping one another succeed.



Concorde provides the freedom to run my business the way I see fit, without unnecessary restrictions, which is invaluable. Concorde is widely recognized as a leader in this area, and their commitment to high standards gives me and my clients greater confidence in the solutions we offer.

**- JEFFREY BANGERTE**

**REGISTERED REPRESENTATIVE SINCE 2019**



AT CONCORDE, WE EXIST TO  
**EMPOWER** FINANCIAL PROFESSIONALS.



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