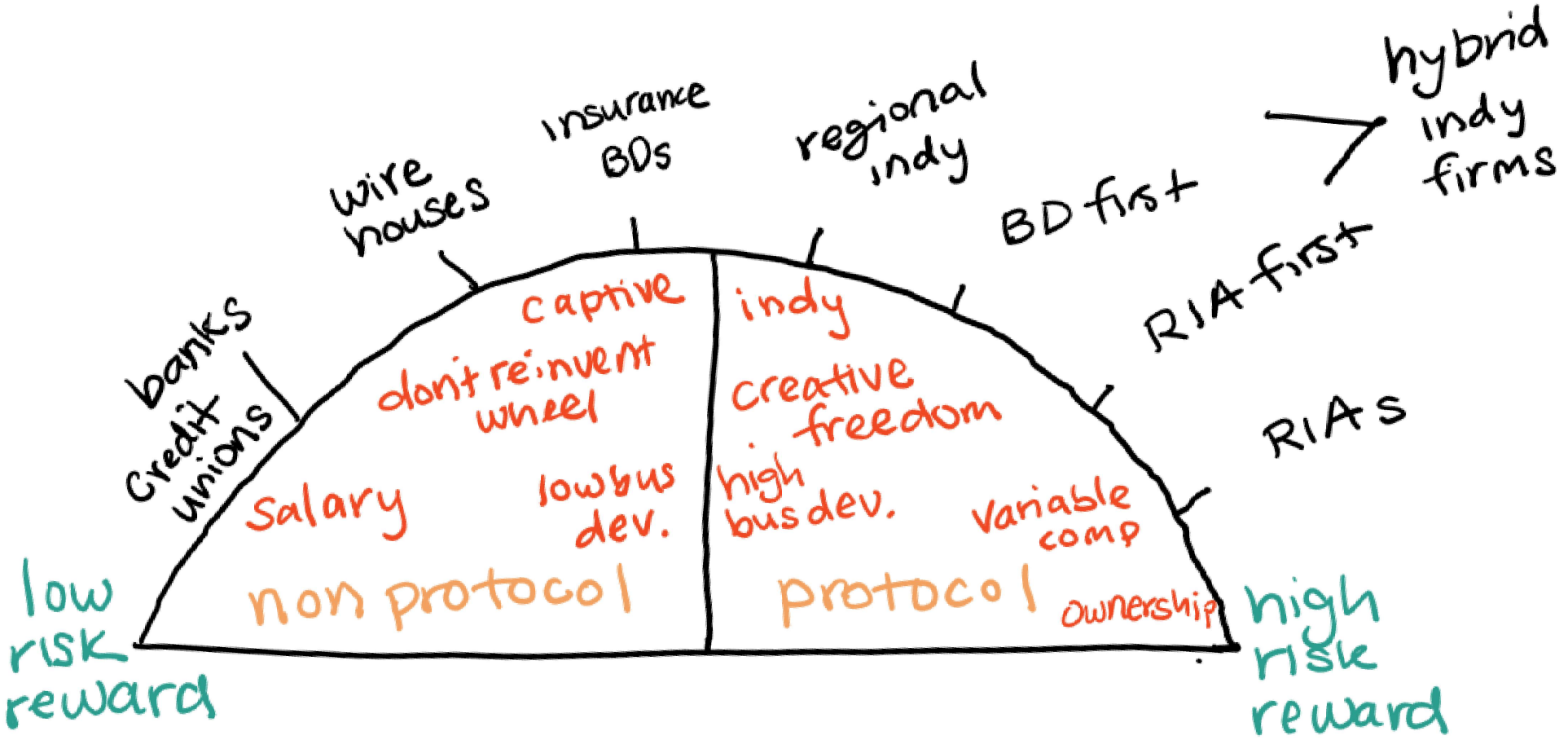
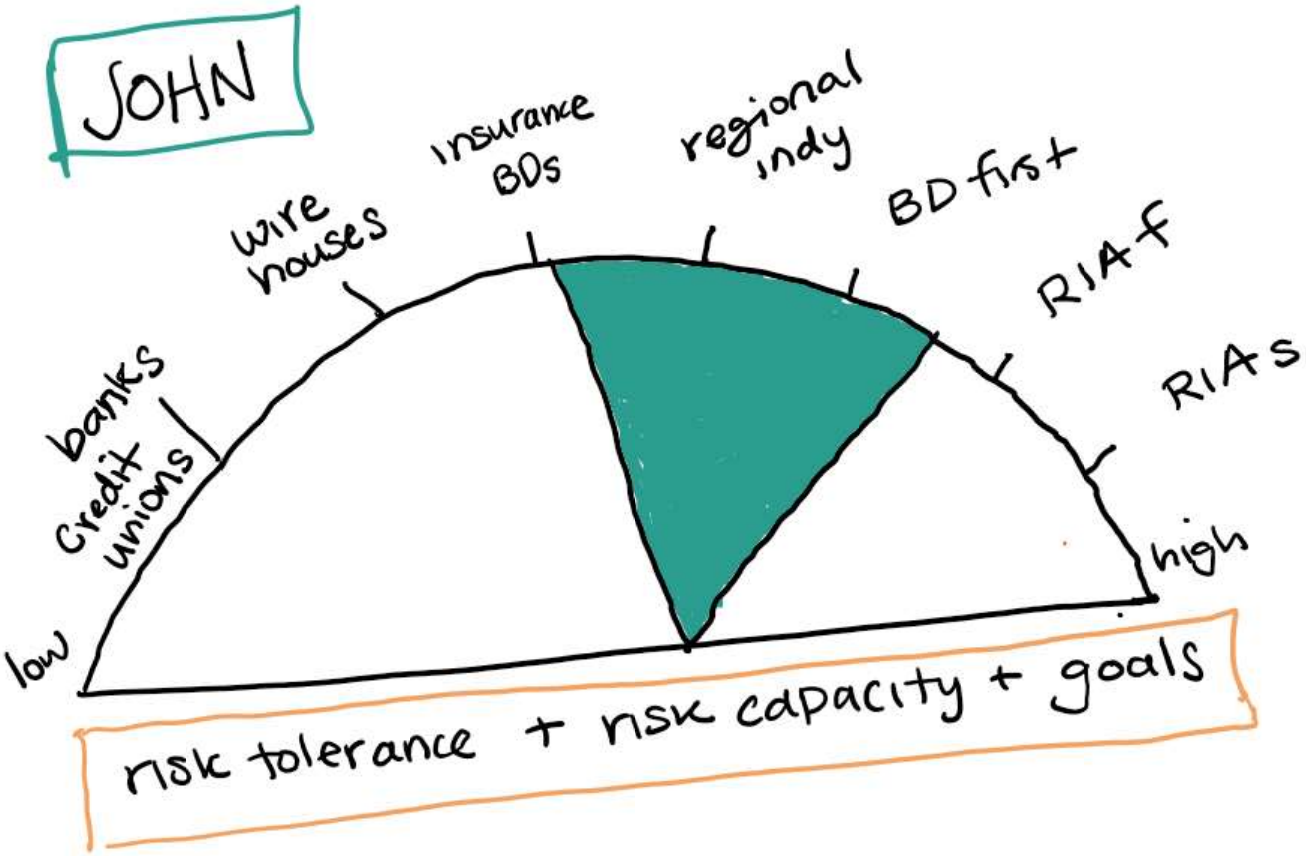
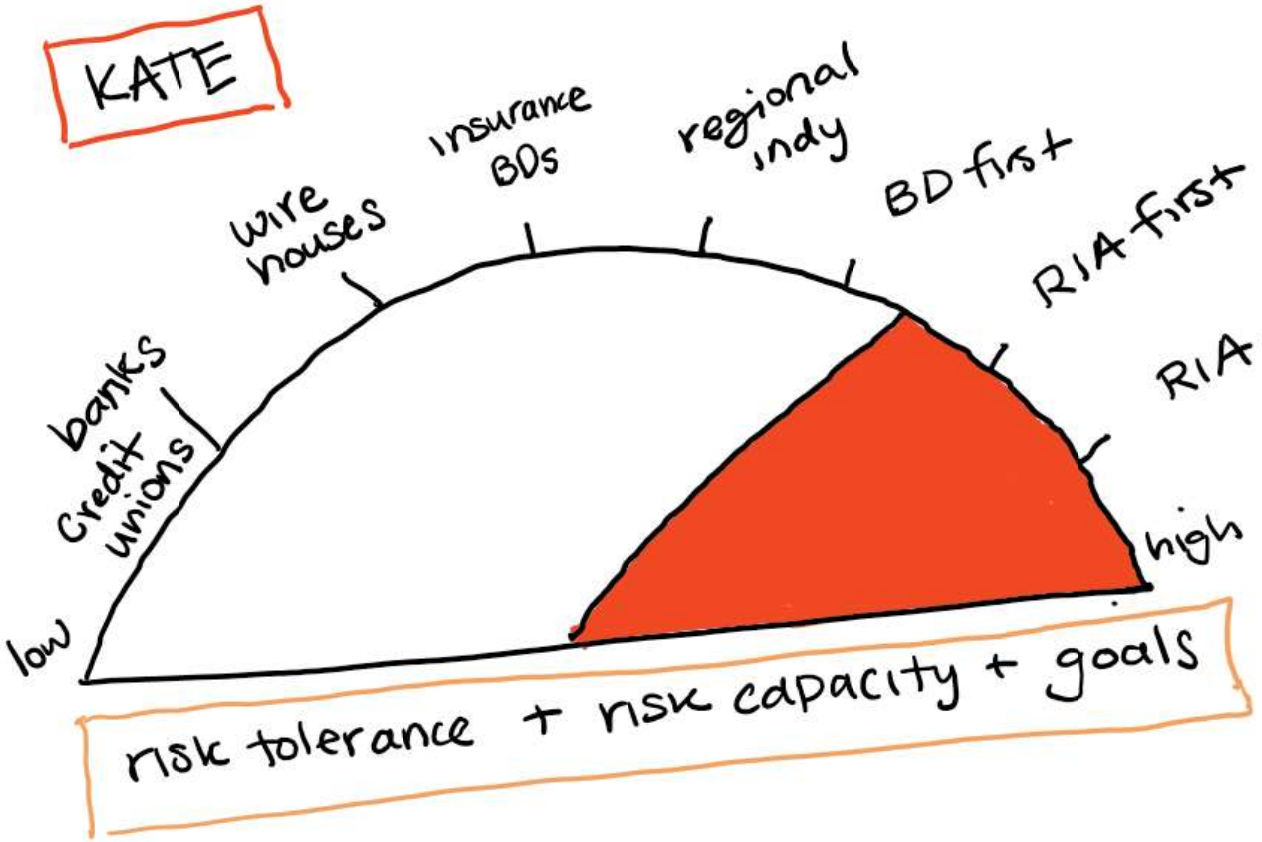

banks
Credit unions
wire houses
insurance BDs
regional indy
BD first
hybrid indy firms
RIA first
RIAs
captive
don't re-invent wheel
salary
low bus dev.
non protocol
indy
creative freedom
high bus dev.
variable comp
protocol
ownership
low risk reward
high risk reward

catalyst


JOHN
banks
credit unions
wire houses
insurance BDs
regional indy
BD first
RIA-F
RIAs
low
high
risk tolerance + risk capacity + goals

catalyst


KATE
banks
credit unions
wire houses
insurance BDs
regional indy
BD first
RIA first
RIAs
low
high
risk tolerance + risk capacity + goals

catalyst