



THE STANDARD FOR EXCELLENCE IN FINANCIAL MARKETS RECRUITING

*The leading provider of Financial
Capital Markets recruiting and
executive search services*



INTEGRATED
MANAGEMENT RESOURCES

Consulting Process for Financial Advisors and Wealth Managers

Integrated Management Resources is a leader in placing finance professionals in both regional and global investment banks, hedge funds, and money managers. Our Private Wealth Management division is dedicated to helping advisors and wealth managers find and evaluate opportunities that best fit you, your practice, and your long term career goals.

OUR PROCESS

We help you identify and assess your current challenges and objectives. By taking the time to understand your practice as well as your professional goals, we will provide you with targeted opportunities and help you throughout the decision making process. If you are an advisor, or a principal of a wealth management firm we work with you at no cost. We are compensated by the firm that you ultimately join and your transition package is never impacted by our involvement.

WE ARE YOUR ADVOCATE

It is our mission to take genuine interest in your individual situation and act as your unbiased guide and counselor to determine if your current situation is in line with your practice, career and life goals. You may be considering a transition, or it may not even be on your radar, but it makes good business sense to educate yourself and explore the process of a personal and career assessment to determine if you are on track.

INDUSTRY EXPERIENCE

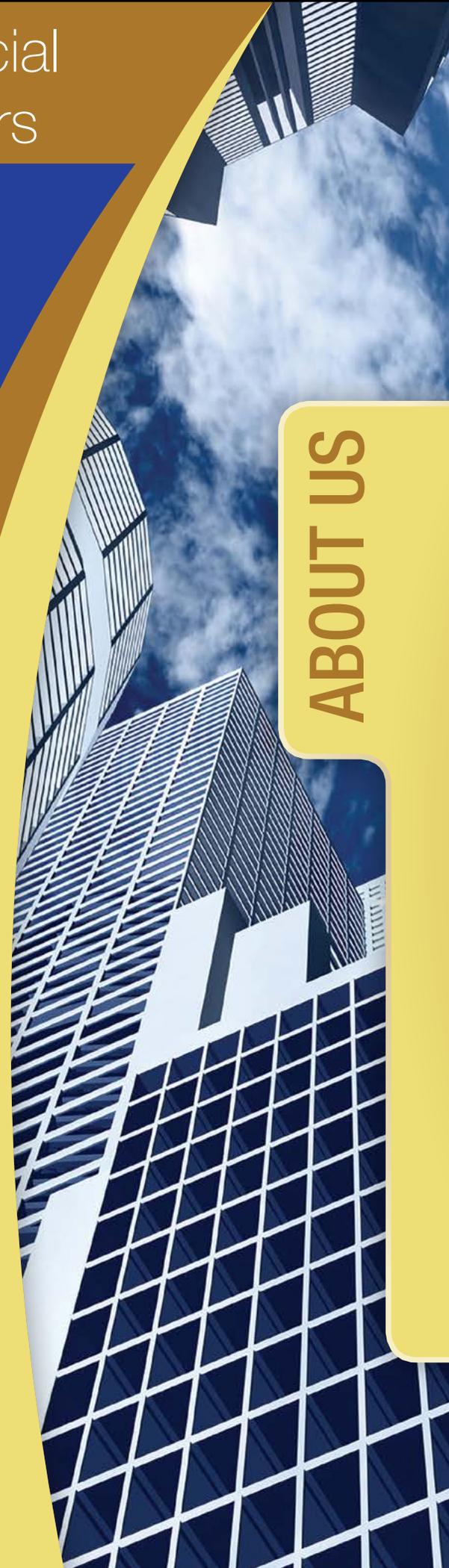
We know what it is like to be in your shoes! Our team members have worked in your industry as financial advisors before joining Integrated Management Resources. They have gone through the process of transitioning their previous practices themselves and understand your concerns. The team will help you avoid potential pitfalls by understanding the differences in the hiring firm's culture, products, platforms, compensation and wealth building opportunities. Then they will guide you through the evaluation and the decision making process.

CONFIDENTIALITY

We understand the importance of confidentiality.

The utmost protection of your confidentiality is our commitment to you. We pride ourselves on a 20+ year track record of ethics, integrity and discretion.

ABOUT US



Financial Services Firms

EXPERTISE

Because our search consultants have been financial advisors themselves, they are very adept at articulating your platforms characteristics, technology, payouts, and wealth building opportunities. They are able to compare and contrast to your competition and deliver the value proposition. This leads to more face-to-face interviews for you and more chances for you to continue to develop interest in the prospect.

THE SEARCH

In addition to maintaining existing relationships, our search consultants are continually cold calling new prospects and beginning the development on new relationships. We target specific firms where we feel the FA's will have the best matched profiles to fit your platform. As a third party we are able to target specific companies without the threat of cease and desist or litigation.

THE NEGOTIATION

With our extensive negotiation experience and market intuition, we are able to provide an effective communication avenue between both sides whereby a mutually beneficial and successful result is achieved. Our account managers are experts in the management of candidate's expectations and helping them understand the opportunity.

THE CLOSE

Our track record speaks for itself. When our clients make the commitment to the candidate, Integrated Management Resources closes the deal.

Integrated Management Resources is the leading provider of Financial Capital Markets recruiting and executive search services with a successful 20+ year track record. We specialize in the recruitment and placement of professionals working in the financial markets of the United States, Europe, and Asia.

We are proud to specialize in the placement of financial advisors and wealth advisors. Our clients include premier global wirehouses, regional broker dealers, boutiques, banks, independent broker dealers, RIAs, private equity, and custodian/clearing firms.

Jim Wilkerson, Managing Director and head of the Private Wealth Practice, has a successful 30 year track record in finance. His expertise offers the FA/wealth manager insight into the various options in the market not found at other recruiting firms.



INTEGRATED
MANAGEMENT RESOURCES



7581 S. Willow Drive, Suite 102
Tempe, AZ 85283

Telephone: (480) 460-4422
Fax: (480) 460-4424

info@integratedmgmt.com
www.integratedmgmt.com

A member of the Sanford Rose Associates® network of offices.



INTEGRATED
MANAGEMENT RESOURCES