Strength through Partnership
At Symmetry, we build infrastructure around your business...

We support a community of independent fee-based advisors who are driven to grow their businesses by combining their unique strengths with our academically based investment philosophy, industry leading sales and marketing support, and comprehensive technology and operations solutions.

But that’s only the beginning. As a firm, we have spent years working with financial advisors, and through these relationships, we have learned how we can better help you increase the efficiency and profitability of your financial advisory business through Symmetry’s Advisor Services Group.

With Symmetry, you can gain exposure to...

A Unique Investment Philosophy
Symmetry sidesteps traditional investment approaches and looks instead to more than 60 years of Nobel Prize winning and recent academic research to help investors optimize their return potential while mitigating risk. Our research team engineers and manages diversified portfolios that offer exposure to a variety of risk factors and market segments.

Symmetry’s investment offerings include the Symmetry Structured. These broadly diversified portfolios are constructed from institutional mutual funds from Dimensional Fund Advisors (DFA). Symmetry also offers both ETF and Bond portfolios.

Sales & Marketing Tools
Leverage sales and marketing support that is designed to help you target, acquire and retain clients. We’ll help you to differentiate your business, maximize your productivity and increase the efficiency of your advisory practice by:

• Helping you gain visibility in your marketplace
• Offering portfolio analysis and hypothetical illustrations
• Developing efficient practice management solutions to help you target centers of influence, segment your client base, address staffing issues, and earn more qualified referrals
Technology & Operations
Our interactive technology platform, Symmetry e-Advisor®, offers you access to a variety of asset management solutions, proposal generation tools and account management resources including:

- Advisor focused mobile, web, and video tools
- A wealth of on-demand, customizable performance options
- Account rebalancing

The Advisor Services Group
When engaging the Advisor Services Group (ASG), our dedicated team of consultants will help you grow your practice and increase your profitability by offering you the tools and resources necessary to help you:

- Target, acquire and retain a loyal following of clients
- Systematize your business to achieve scale, increase efficiency and maximize productivity
- Develop the professional skills necessary to differentiate yourself from the competition
- Become a more successful business owner
Discover Symmetry’s Advisor Services Group and the suite of services available to help you build a more efficient and profitable business including:

The Creation of a Unique Positioning Statement
To effectively grow your business, you have to differentiate yourself from the competition. You must be able to articulate how you are unique, and how your specialized skill-set, knowledge and experience can help satisfy your clients’ financial needs.

To help you convey this message, your Advisor Services Consultant will assist you in creating a clear, concise Unique Positioning Statement (UPS) that succinctly describes:

- Who you are
- What makes you different
- The value that you bring to your client relationships

Include your UPS on your business cards, newsletters, customized brochures and other client materials as a constant reminder of the value that you bring to your relationships.

ABC Asset Management is a financial planning firm that works primarily with professionals in the medical field who are interested in strategies for wealth accumulation and preservation, as well as distribution strategies that will enable them to enjoy a secure and comfortable retirement. Our comprehensive financial planning process helps us to fully understand our clients' goals and objectives, and we will implement a sound financial plan that's been crafted based upon each individual's specific needs. Equally important is regular contact with our clients to keep them informed of any market related news that may be relevant to their portfolios as we monitor their progress toward attaining their goals.

At ABC Asset Management, we strive to deliver the highest level of advice and service to our client community as they are entrusting us with not only their financial assets, but with their financial security as well.

ABC Asset Management offers the service needed to enhance your overall investment experience. To learn more, contact ABC Asset Management today!

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The Client Communication Program

Most would agree that regular communication with clients is critical to an advisor’s success. To keep your clients satisfied, you must reach out to them on a regular basis with investment information that’s both educational and relevant to their personal experiences.

To help streamline your client communications, the Advisor Services Group (ASG) has created the Client Communication Program. Designed to provide investors with regular, timely and practical communications, the Client Communication Program is a systematic solution that allows you to “touch” your clients each month with minimal time or effort, while simultaneously helping to enhance their satisfaction.

Featured communications included in the program are:

Quarterly Client Review Packages (Q-Packs) – These quarterly updates are designed to provide an overview of market related events from the preceding quarter, so clients can better understand some of the impacts to the diversified stock and bond markets in which Symmetry invests.

Advisor Views – Offered eight times per year, this feature provides you with ghost written articles on a variety of market-related topics that you can share with clients.
**Assistance in Building Your Brand**

In our opinion, one of the most important ways to differentiate yourself, gain recognition in the marketplace and grow your business is through a distinct and recognizable brand. When implemented properly, your brand should clearly deliver your message, confirm your credibility, connect with your audience, and motivate prospects.

When committing $5 million or more in assets with Symmetry, the Advisor Services Group can help promote the advisor through the co-branding of various Symmetry sales and marketing pieces. In addition, these advisors have access to Symmetry’s Advisor Choice Branding program. When using Advisor Choice Branding, advisors can choose between two messaging options, “The Power of Passive®” and “Success Starts at the Core.™” Advisors can then select from a wide variety of themes, colors and fonts to create marketing materials that are truly unique, and that speak to them and their businesses.

**Referrals**

Most advisors cite referrals as one of their primary business drivers. As part of Symmetry Partners’ ongoing efforts to provide our advisor community with industry leading practice management solutions, we have created a host of referral resources to help you systematize an essential part of your firm’s growth.
Event Planning Guides

Events are opportunities to cultivate relationships and educate clients. Are you thinking about planning a client appreciation affair? Organizing a referral event? The options are endless, and Symmetry’s suite of event planning materials assists in every step in the planning process.
Don’t Just Take our Word for It
Symmetry supports a community of successful, independent, fee-based advisors by combining their talents with our unique investment philosophy. With the support of academic research, robust technology solutions, and industry leading sales tools and marketing support, Symmetry can help increase the productivity and efficiency of your financial advisory practice.

See how some advisors benefit when partnering with Symmetry.

“Symmetry has been a true partner to whom we outsource asset management thereby enabling us to insource relationship management. They put together programs, develop asset allocation models, and work closely with us on developing education programs.”

Phil and Dan Henry - Henry Wealth Management, LLC

“Symmetry has been the game-changer. They have allowed me more time to work face-to-face with clients so that I can build stronger relationships, and focus on what’s really important to growing my business.”

Bill Sylvia - The Patriot Financial Group

“I love the Symmetry story…it is simple and unique. Symmetry also provides my team with a tremendous amount of support for business development, marketing, and almost anything we ask for.”

Niki Mullinix - Mosaic Wealth Consulting
About Symmetry Partners, LLC

Founded in 1994, Symmetry Partners, LLC is an investment advisory firm registered with the Securities and Exchange Commission. Based in Glastonbury, CT, Symmetry offers portfolio management services to individuals, retirement plans and institutions, for the clients of independent financial advisors across the country.

Believing that investors should have access to unbiased research, Symmetry uses more than 60 years of academic research in constructing passively managed, broadly diversified portfolios with a goal of optimizing returns while mitigating risk.

To learn more about the unique opportunities available through Symmetry Partners, contact Symmetry’s Advisor Services Group at 800-786-3309, option 1.

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Diversification seeks to improve performance by spreading your investment dollars into various asset classes to add balance to your portfolio. Using this methodology, however, does not guarantee a profit or protection from loss in a declining market. Investors should consider the investment objectives, risks, and charges and expenses of the investment company carefully before investing.