

GVA works with a strong network of like-minded advisors who put their clients' financial interests above their own.



"GVA has elevated us to a higher fiduciary standard. We feel confident that we're operating in the best interests of our clients because we're investing in crucial oversight."

- GVA Advisor



"The GVA partnership exists to make sure we meet certain standards. They evaluate what we're doing to make sure it makes the most sense. That additional oversight is invaluable and something we invest in to better serve our clients."

- GVA Advisor

GVA is an integral part of our business and a critical component of your success. If you have questions, or would like more information about GVA or our partnership, we are here to help.

Our Partnership with Great Valley Advisor Group

**Working together to provide
oversight and guidance
to help you succeed**

Learn More About Great Valley Advisor Group at www.greatvalleyadvisors.com or visit:



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Securities offered through LPL Financial, member FINRA/SIPC. Investment advice offered through GreatValley Advisor Group, a Registered Investment Advisor and separate entity from LPL Financial.



GREAT VALLEY ADVISOR GROUP
WWW.GREATVALLEYADVISORS.COM

WHO IS GREAT VALLEY ADVISOR GROUP (GVA)?

GVA is a leading technology-driven, full-service Registered Investment Advisor (RIA). GVA partners with select independent financial advisors to provide customized technology, investment strategies, compliance, and back-office solutions.

The strength of the GVA network, and their unwavering commitment, enables us to best serve you and fulfill our fiduciary obligations.



- an extension of our team -

provides an additional layer of oversight to ensure we're providing the highest level of services possible.



Does the GVA Partnership Cost Anything?

We invest our revenue in the GVA partnership at **no additional cost to you**. We do this because we believe it's **in your best interest**, as well as our own.



Does GVA Handle My Investments?

No, not unless we choose to **utilize GVA Asset Management (GVAAM) Team**. Additionally, GVA does not have a direct affiliation with any investment company, so we are free to select from **multiple solutions to align with your goals**. So, while GVAAM does provide **additional insights** to help guide our investment decisions, GVA does not dictate planning or investment strategies.



How Does the GVA Partnership Benefit Me?

Acting as an **extension of our team** GVA focuses primarily on ongoing compliance services. In addition, the partnership provides additional oversight, resources, technology, and tools that **help us better serve you**.



Will GVA Contact Me Directly?

You will occasionally receive materials from GVA. You may also see them referenced in various resources, from proposals to investment advisory, and regulatory information.

