



ADVISORS
PARTNERS
INNOVATORS
COLLABORATORS

Founded in 1991, The Association of Professional Investment Consultants is an organization created for Advisors, by Advisors.

The organization where advisors **connect**, **collaborate**, and **share** best practices to enhance the service delivered to their clients and grow their business.

JASON FRIEDMAN

New York, NY

To me, APIC is a community of serious advisors consistently trying to hone their craft and get better each and every year. I appreciate the willingness of members to share best ideas and real deliverables without hesitation. APIC is all about getting better at what you do and helping others reach their potential. No other agenda.

STEVE AUSTIN

Austin, TX


Some of the finest, most accomplished, professional and forward-thinking advisors at Morgan Stanley are APIC members. I encourage every FA who is committed to growth, improvement and the pursuit of professional excellence to learn more about it.




Are you new to the firm and looking to create a network?




Do you want access to exclusive advisor led content and events?



Do you want to participate in strategic initiatives of the firm?



Are you looking to develop leadership skills and find your successor?



Do you want to explore opportunities to partner to grow your business?



Are you interested in coaching and mentoring from top advisors across the country?

WHO IS APIC

CHRISTIAN MAGUIRE

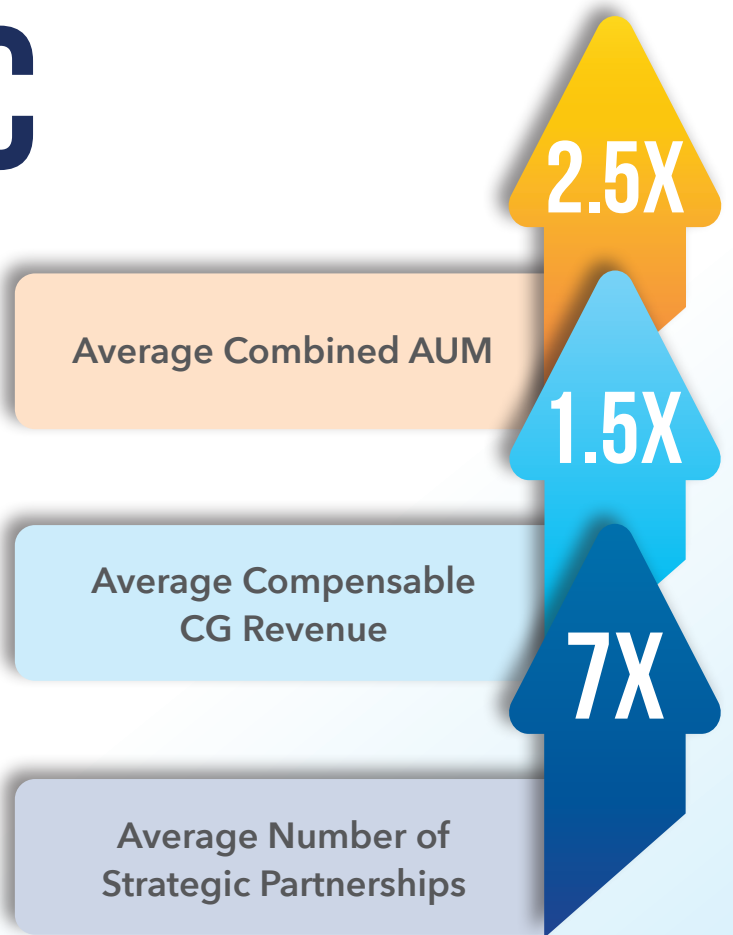
Garden City, NY

The openness and genuine desire to help is a core principal of every APIC member and is just one of many reasons why the organization is one of the best things Morgan Stanley offers to their FA population. From team operating manuals, to new account opening and new client onboarding checklists, we have gained access to the intellectual capital of the best teams and that has saved us time and errors.

BETSY PAKENAS

Frederick, MD

I see APIC as a resource for everyone: a voice to management, a seat at the table for FAs and a strong conduit for communication between management and the FA community.



APIC can help you and your team:

- Find team members or join a team.
- Manage succession planning
- Find opportunities to grow your business



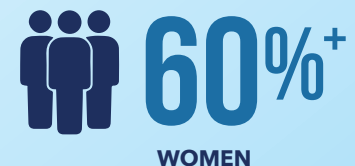
APIC offers:

- Annual Advisor-led Conference
- Annual Due-Diligence Meetings
- Monthly APICRadio Podcast
- Monthly APICConnect Webinar



At APIC, you'll hear how top advisors:

- Make best use of firm tech
- Incorporate best practices
- Approach their various niches and uncover strategic partners



TO LEARN MORE, VISIT WWW.APICMS.ORG

Association of Professional Investment Consultants | 888-472-6793 | info@apicms.org