Cambridge Financial Institutions

Start attracting, building, and retaining strong client loyalty

Why partner with Cambridge?

Clients continue to expect more from financial institutions – from the technology provided to the investments and suite of products available. Partnering with the right third-party broker-dealer gives you the opportunity to better support your clients, and is critical to ensure diversification of revenue and ultimately obtain more of the client's wallet share. By providing state-of-the-art wealth management and financial planning solutions, combined with your other offerings, your clients are more likely to work with you on their many financial objectives.

Cambridge, one of the largest privately controlled independent broker-dealers in the country, assists financial professionals in partnering with banks and credit unions across the country. At Cambridge, we are looking for true partners who share the vision of bringing prosperity to their clients and stakeholders.

The Statistics Don't Lie

Offering investment services attracts the most desirable customers, and keeps more of their money with you. Increased client loyalty translates into lower client attrition.

3.2x

Investment clients carry checking account balances that are 3.2 times the balances of other clients

The average household has

2.6 financial institutions

The average investment client has been a client of a financial institution for

2.5 years longer

than other clients

Cambridge Financial Institutions

Cambridge Financial Institutions, designed exclusively for participating financial professionals with Cambridge, is ready to serve as your dedicated support team. Whether you are looking to establish a new investment program or enhance existing services, our experienced team has the knowledge and tools to help your business reach new heights. Our sole focus is your success.

Together, we can help you:

- Add a new investment program/enhance existing services
- Build collaborative relationships with financial professionals
- Increase non-deposit revenue
- Increase loan and credit card balances
- Attract and retain high quality clients

Supporting financial institutions for more than 35 years

By working with Cambridge, financial professionals and the institutions they partner with have access to a wide variety of products and services, as well as technology solutions, customer service, and compliance support.

Financial professionals with Cambridge work independently or as an employee of the financial institution. While each entity may remain independently operated, everyone works together to provide a comprehensive, integrated wealth management experience.

- Flexibility in structuring revenue sharing partnerships
- Access to a full breadth of investment products and services
- Dedicated marketing support
- Practice management coaching and consulting
- Advanced client case design
- Innovative, industry-leading technology

Start enhancing your investment program today

Contact Cambridge Financial Institutions (fi@cir2.com) at 800-777-6080.

About Cambridge

Cambridge is a financial solutions firm serving financial institution professionals and their investing clients while preserving its private control. Cambridge offers a broad range of choices for independent financial institution professionals regarding solutions for advice, growth, technology, and independence. Cambridge's national reach includes: Cambridge Investment Research Advisors, Inc. – a large corporate RIA; and Cambridge Investment Research, Inc. – an independent broker-dealer, member FINRA/SIPC, that is among the largest privately controlled independent broker-dealers in the country. Cambridge believes its plan for independence starts with the stability of management and private control.

Cambridge has spent several decades perfecting a formal succession plan, which includes indirect ownership by associates through an employee stock ownership plan (ESOP), plus indirect ownership by management.

Figures featured throughout this brochure are courtesy of BISA, "Evaluating the Return on Investment Services to the Banking Enterprise," 2019

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