Cambridge Financial Institutions

Start attracting and retaining more of your ideal clients

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 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 internally 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 relationships with

2.6 financial institutions

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

2.5 years longer

than other clients

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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 40 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 between financial professionals and institutions
- Access to more than 6,600 mutual funds, plus a vast array of product companies providing variable annuities, alternative investments, and more
- Dedicated marketing support, including website design, social media management, and content creation
- Practice management coaching and consulting to streamline operations and accelerate growth
- Advanced client case design in the areas of insurance, investments, and retirement plan solutions
- A comprehensive online business environment designed to meet the unique needs of the many varied business models

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 internal 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 internally controlled independent broker-dealers in the country. Cambridge believes its plan for independence starts with the stability of management and internal control.

CAMBRIDGE