



Collaborative Insurance Solutions and Expertise that *Enhance* Outcomes for Your Clients

OUR GOAL IS YOUR LEGACY

About Us

RIAs face two main challenges in their businesses.

1

HNW clients are **asking more of their advisors**, wanting and needing more support in all aspects of their lives.

2

Sustainable practice growth must be driven by organic forces, and firms are facing increased pressure to uncover avenues to achieve it.

Ancillary services have become critical for RIAs to sustain growth over the long-term and meet evolving business challenges.

Outsourced insurance management solves for both of these challenges, adding value for clients and driving real revenue growth.



About Us

Who we serve.

CBS is focused on changing how insurance is delivered to the end client. It's not simply a product to be bought and sold; it's a tool to enhance client outcomes.

We work best with growth-minded, fiduciary, planning-first advisors and RIAs.
We have touched all corners of the financial ecosystem:

The enterprise-level RIA needing to streamline legacy approaches to insurance.



The strategic acquirer seeking to build a scalable insurance process that expands their business.



The multi-billion dollar RIA looking to drive organic growth.

Our Services

How we deliver.

We create a scalable, repeatable process that enhances client outcomes, adds value and drives growth.

We serve two main purposes in the RIA space:



We unlock potential for future organic growth via comprehensive client segmentation and identifying new pathways to grow existing relationships and increase wallet share.



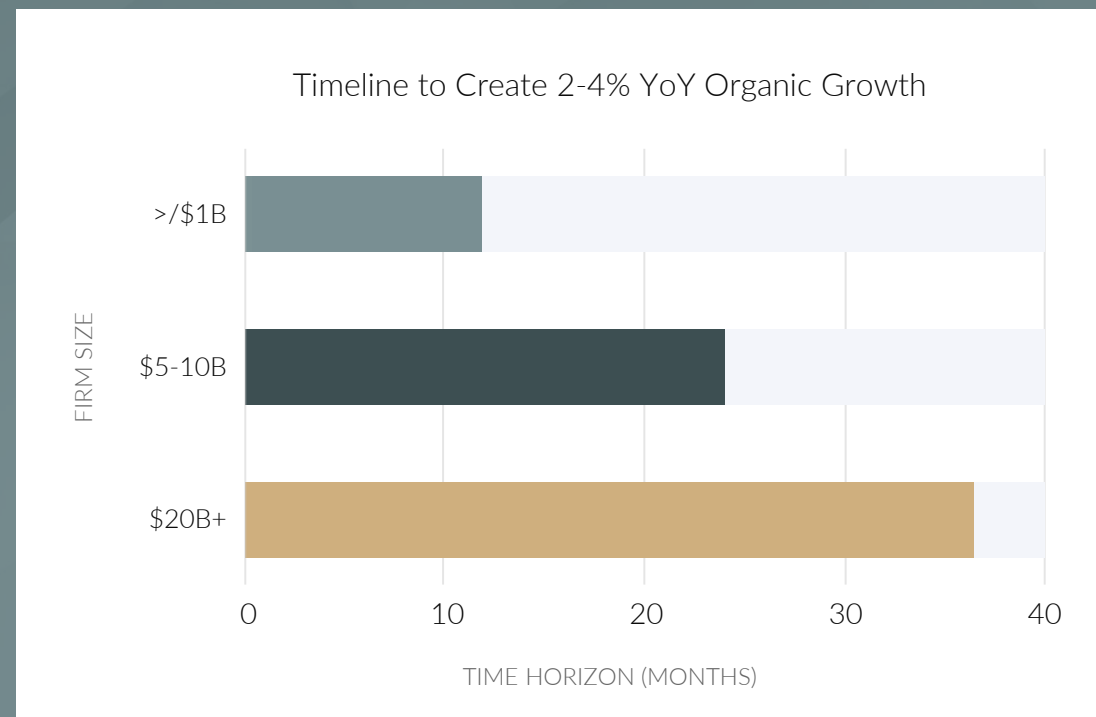
We deliver additional services that support a holistic business model, while reinforcing the advisor-client relationship and justifying service fees.

About Us

We help you harness the up-side.

Our recommendations are anchored by a planning-based philosophy. Our process comes down to black-and-white details, hard data and scratch-pad math. We present solutions that create a real benefit for the end-client and that prioritize their goals and needs.

And - most importantly - we show our work.



Our Services

What you can expect.



Contact Us

We want to connect with you.



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