

# A Clear Angle on Financial Advice



## Did You Know?

When financial advice, products, and custody are all under one roof, **conflicts can arise.**

## Dynasty's Triangulation of Advice®

The Dynasty Triangulation of Advice® model separates where financial advice is given from where products and services are sold, and again from where assets are custodied, allowing your financial advisor to put your best interests first.



## How It Works



### Your Advisor, On Your Side

An independent advisor who sits on your side of the table and represents your interests, not a product and services provider.



### Access to a Broad Marketplace

Your advisor can “shop the street” to help find the most suitable investment solutions including savings, alternatives, mortgages, private markets, and more.



### A Plan Built Around You

Receive a personalized financial strategy tailored to your goals and values.

## Why The Triangulation of Advice Matters

At Dynasty we set out to democratize:



**Fiduciary Alignment**



**Personalized Planning**



**Broader Product Access**



**Advice Aligned to Your Interests**



**Transparent Custody**

## Let Dynasty Connect Match you with the Right Advisor

Through Dynasty Connect, you gain access to a national network of over 500 independent wealth management advisors who collectively manage more than \$120 billion in client assets. We'll match you with an advisor who aligns with your goals, values, and financial needs.



Find the advisor right for you at [dynastyconnect.com](https://dynastyconnect.com)