Dinergy Wealth Management

An invitation to independent advisors

Our invitation is simple.

Join us.

Our purpose is clear.

How can we help you care for your irreplaceable reputation?

Dinergy's Purpose

Over the past two years, we've listened to dozens of you talk about what's important in choosing your RIA partner, we've learned what works for you, what doesn't and what's missing; we've heard that a lot of the bells and whistles often found among your existing RIA partner options are just that, bells and whistles. They don't add value.

We agree that your reputation is your most valuable asset. You've worked hard to create it and know that one misstep from any of your chosen partners can damage it.

It's been a busy two years and we're certain that we can add value to the industry, independent advisors and their clients.

We start with the premise that helping you care for your irreplacable reputation is a business.

"Built for advisors by advisors" is necessary but not sufficient. "Built for advisors by advisors AND strong leadership with experience running large multi-billion dollar, national businesses"... that's our competitive advantage.

We understand and appreciate what you need in an RIA business partner to help you care for your clients' financial futures.

At the same time, we know what it takes to turn that appreciation into business practices that support you daily and help you care for your irreplaceable reputation.

When we deliver on our purpose, we all win.

Our leadership is experienced.

We have managed large businesses, billion dollar RIAs, client books, and national office networks.

Dinergy’s Leadership Team

Martin Murray has a strong RIA track record, leading a Barron’s Top 100 RIA with over $1.5 Billion AUM, and 2,500+ clients with independent advisors in multiple states. He’s delivered 12%+ annual AUM growth 4 years running and has been an invited guest speaker at Barron’s Top 100 Advisor Summit with talks focusing on advisor growth, branding, business structure and marketing.

Joe Lind has created and led a national network of 750+ financial professionals producing 14,000+ loans annually worth $4+ billion/year. With operations in 26 states, his experience guiding 60+ independent offices (each with different goals, business practices and personalities) gives us an excellent foundation to support your practice.

Tim Fitzharris developed his transparent philosophy toward client relationships and investments managing multi-million dollar relationships at some of the industry’s most recognized firms. He’s been a key leader with a large RIA, managing $1.2+ Billion AUM serving 250+ IAR relationships spanning 25+ states. These experiences have formed our understanding of the challanges you face day-to-day trying to balance the demands of your practice.

Phyllis Jackson has been a top Fortune 50 corporate leader in understanding consumers and how they make decisions — transforming that understanding into business building action steps. This unique speciality gives us a leading capability to help your practice gain a competitive advantage.

Our technology
is best-in-class.

We blend our
proprietary systems
with leading
industry software
to support your
practice.

Dinergy's Technology Edge

Start with the end in mind. That's been our approach to technology from the beginning, with every decision made through the lens of supporting a network of independent advisors.

We've selected the leaders in each of the key categories to create a seemlessly integrated technology solution to support your clients and your practice.

TD Ameritrade Institutional

Docusign

Envestnet

Hidden Levers

Blackrock

As we talk with independent advisors about growing their practice, one of the challanges we often hear about is how to efficiently gather personal and account information from new clients.

Dinergy's Client Information Profile is the solution. A proprietary database built to easily collect personal and account information, including statement images, through a portal on our web portal.

We've designed the Client Information Profile to meet the highest information security standards to ensure your clients' personal information is transmitted and stored safely.

We've also designed it to ensure only you have access to your clients' data.

Our investment portfolios are managed for risk.

We help guide your clients to the right portfolio for their risk preference and invest to protect upside.

Dinergy's Investment Strategy

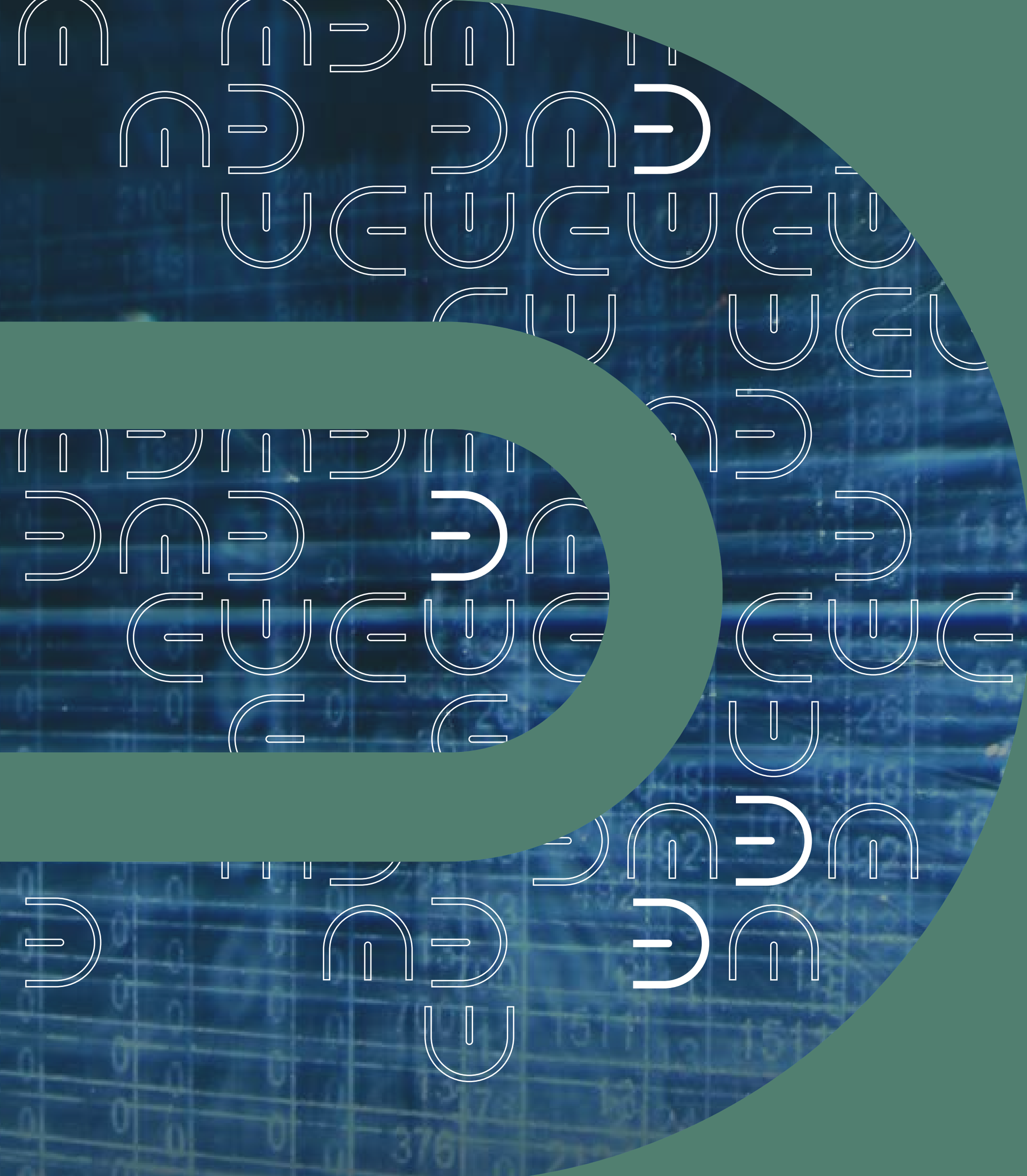
Truly successful advisors realize they cannot be everything to every potential client, and we appreciate that the models we manage for you and your clients are not for every potential investor. We specialize in one thing with our models—delivering risk appropriate returns in a variety of market environments. It's simple, clients want to participate in growth when the markets provide those opportunities...and when those opportunities are not present, they want a safer position to preserve those gains.

Managing advisory relationships in today's world is a tough job. Clients are bombarded with "noise" from every angle during every minute of the day, and that only adds to the weight of your job in guiding them on a successful financial path.

With all that you deal with in your daily responsibilities, managing reliable investment portfolios shouldn't be an additional burden on your plate.

Successfully managing client relationships and the daily investment decisions on a series of investment portfolios is a task that few advisors can appreciate...and the ones that do appreciate the time, resources and energy it takes to do both extremely well decide they can only do one or the other.

This is when you need a partner that takes as much pride in managing investment portfolios designed specifically for your clients' risk preference, as you do in caring for your relationships and client success.



Our partnership with you is collaborative.

We are responsive to your needs with advisor payouts that scale up on increased AUM and flexible client fee programs.

Dinergy's Partnership Model

Wrap-fee programs for your clients and you

For your clients: a single transparent fee includes advice, market insights and thought leadership, investment management, custody and performance reporting. No more line items that add basis points to your clients' fees and questions to you.

For you: an easy to understand payout program that includes risk and investment analysis tools, available and responsive support from account opening to insights and leadership on investment positioning and performance. All you need to support your current clients and grow your practice. No more nickel and dime fees due monthly or quarterly.

Client pricing flexiblity

We realize that one price doesn't fit all so we've created client price programs that give you flexibility in client fees. Unlike most other RIA partners, when you think it's appropriate to go lower on pricing to win or improve a relationship...we'll share in doing what's necessary to help you grow..

Competitive, scaled advisor payout program

Payout increases on assets above key breakpoints of $5 and $10 million, enabling you to earn incremental payout on assets as you grow your practice.

Clear	**Purpose**
Experienced	**Leadership**
Best-in-class	**Technology**
Risk managed	**Investments**
Collaborative	**Partnership**
Simple	**Invitation**
Join us	RSVP today.

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