

# The Trifecta: Executive Summary



A groundbreaking partnership between Experior Financial Group and Global View Capital Management, aiming to provide significant value to the market and offer unique opportunities for insurance agents and registered investment advisors (RIAs). The collaboration is described as a powerful trifecta, combining the strengths of both companies to create a robust and innovative business model.

## Shared Mission and Vision

The collaboration is rooted in a shared mission and vision, emphasizing the importance of building strong financial foundations for families, empowering them today, and leaving a lasting legacy for tomorrow. The partnership evolved organically as both companies recognized the alignment of their missions and principles, leading to the creation of a powerful partnership.

## Trifecta Partnership with Quantum

Quantum as the third component of the trifecta, bridges the Experior and Global View collaboration. Quantum brings years of experience and talent to the partnership, contributing to the distribution of Annexus-designed, and other third party insurance products and enhancing overall case support. The combination of Experior, Global View, and Quantum is positioned as a unique and powerful trifecta, providing agents with opportunities for expansion on both the insurance and RIA fronts.

## Cross-Border Opportunities

An additional highlight of the collaboration is the ability to operate cross-border, allowing advisors in the U.S. and Canada to benefit from the partnership. This feature is presented as a unique aspect that sets the collaboration apart from others in the industry.

## Unique Platform and Expertise

Global View Capital Management's award-winning platform stands out for its ecosystem-like approach in the fintech business. The platform provides financial advisors with a single dashboard to operate their investment advisory, with a focus on tactical money management strategies for navigating various market conditions. The collaboration leverages the best of both companies, combining Experior's strengths in the insurance side with Global View's expertise in registered investment advisory.

## Agency Ownership and Share Programs

A key focus of the partnership is agency ownership and share programs, offering a contractual way for advisors to pass on their businesses as part of a legacy plan. Both companies believe in the importance of allowing advisors to own shares in the firm they are building, providing a rare opportunity for true wealth building. The equity program is designed to reward and incentivize advisors, creating a shared success model that extends to both individual producing advisors and team builders.

## Conclusion

The Experior Financial Group and Global View Capital Management partnership, enhanced by the involvement of Quantum, represents a groundbreaking trifecta in the insurance and registered investment advisory space. The collaboration's emphasis on shared values, unique platforms, agency ownership, and cross-border opportunities positions it as a pioneer in the industry, offering a compelling proposition for agents looking to build a successful and lasting legacy in the financial services sector.