

Ready to Join?

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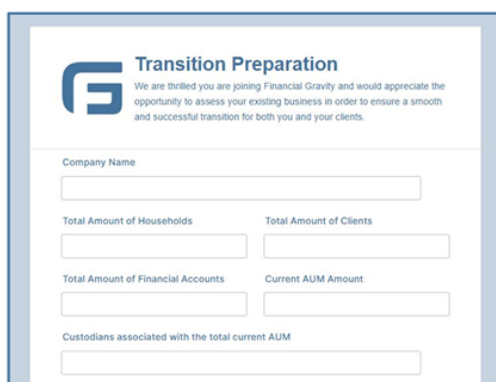
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Ready to move forward?

If you're ready to take the next step, we invite you to begin by completing the Transition Evaluation Form. This form is designed to help us better understand your current situation and ensure a smooth and tailored transition process.



Transition Preparation

We are thrilled you are joining Financial Gravity and would appreciate the opportunity to assess your existing business in order to ensure a smooth and successful transition for both you and your clients.

Company Name

Total Amount of Households Total Amount of Clients

Total Amount of Financial Accounts Current AUM Amount

Custodians associated with the total current AUM

If you have any additional questions or need further guidance at any point in the process, please don't hesitate to reach out. Your Financial Gravity Alignment Specialist or your dedicated Transition Partner is here to support you and provide personalized assistance every step of the way. We're committed to making your transition as smooth and successful as possible.

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