

On Boarding

- ▶ BFWM Transition Specialists: As an advisor or advisor firm transitioning to BFWM, you are paired with a dedicated transition specialist whose sole job is to work with you and your staff on moving your book of business. We provide both advisors and administrative on-boarding specialist.
- ▶ Charles Schwab Integration Specialist: When you join BFWM you are also assigned a Charles Schwab Integration Specialist who will assist you with your transition as an advisor. This includes outlining a game-plan for the weeks leading up to your termination date to overseeing the movement of your licenses and on boarding to Bright Futures Wealth Management.