

Platform Customization Open Architecture

Customization: No two advisors/firms are the same. BFWM prides you with the flexibility to advise and service your clients in your own style and approach.

Models Based and Discretionary Account Options: Advisors inside BFWM can use our successful BFWM investment models suited for client needs or create their own investment models. Our IPC and back office team work one on one with advisors to optimize their unique platform choices.

Integration: We believe the best technologies solution are one that plays well with others. We employee open architecture platforms and technology to insure your advisor based solutions integrate across all tools and systems.

Scale: We leverage our relationships with our technology partners, Charles Schwab and combine them with our back office support staff to give your practice scales of economy. We have negotiated industry leading low cost, optimal payout options. This allows you to focus your time and energy on your clients.