

RIA Owned Operation Center

BFWM provides multiple resources to help our advisors run their businesses more efficiently.

Client Data: At BFWM, Advisors own their client and their data. They are your clients, not ours and you control information coming and going.

Weekly Meetings: BFWM host weekly operational meetings via conference line every Friday. This gives you and your firm up-to-date information and access to the RIA decision making process.

Recruiting and Branch Development: Our recruiting team will work with any of our advisors who are looking to expand their practice through attracting and adding new advisors to their office. Whether it's a producing advisor to complement your current business, a junior advisor to train and groom for the future or a full-blown recruiting plan to grow or start a branch, we are there to help you accomplish your goals.

Marketing Support: We employ a marketing team devoted to consulting with advisors on marketing ideas, creation, implementation, and business growth tactics. We also offer our advisors the option to leverage the BFWM brand, whether it's through BFWM Advisors (for wealth managers) or BFWM Plan Advisors (for retirement plan consultants).