

The BAM ALLIANCE ... By the Numbers

\$26.2 Billion*

Combined assets under management or administration by the member firms of the BAM ALLIANCE

**As of March 31, 2015*

140

Member firms in the BAM ALLIANCE

8*

Firms in the BAM ALLIANCE that have more than \$500 million in managed assets

**As of April 2015*

We recognize the value of the time and energy you spend building your client relationships. With that in mind, we are sharing highlights, key updates and success stories from the BAM ALLIANCE community, so you can learn about how we are helping firms like yours leverage their time and resources to build successful, independent wealth management firms. We hope you will find these items informative and educational as you learn more about our prudent and proven approach.

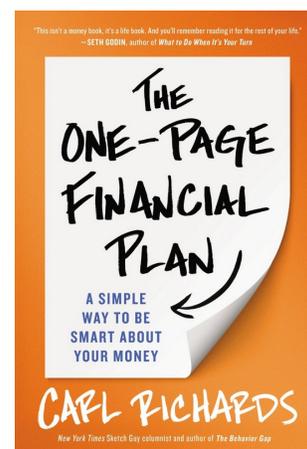
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Carl Richards' New Book Asks: "What's Most Important to You?"

Through his simple sketches and point-on observations, **Carl Richards** has a way of providing clarity to the complex. With his new book, he takes the many layers of financial planning and boils it down to ... one page.

"The fact is, in a single page you can prioritize what you really want in life and figure out how to get there," writes Richards, the director of investor education for the BAM ALLIANCE. "That's because a great financial plan has nothing to do with what the markets are doing, what your real estate agent is pitching, or the hot stock your brother-in-law told you about. It has everything to do with what's most important to you."



51*

Firms in the BAM ALLIANCE that have more than \$100 million in managed assets

*As of April 2015

87

BAM ALLIANCE media mentions in the first quarter of 2015

48

Different media outlets that referenced the BAM ALLIANCE or quoted our National Thought Leaders in the first quarter of 2015, a list that includes *The New York Times*, *USA Today*, *Forbes*, *Glamour* and NBC News

Richards, also the author of *The Behavior Gap*, says his [new book](#) "represents 20 years of work." *The One-Page Financial Plan* (which actually runs 208 pages) covers a range of topics, from spending and saving to budgeting and investing. But what makes this book a great tool for advisors is the way it can help them connect with clients by getting them to look past the numbers and answer the most important question: "What's most important to you?"

As author, speaker and marketing guru Seth Godin says, "This isn't a money book, it's a life book. And you'll remember reading it for the rest of your life."

BAM Launches New 401(k) Platform

One of the most exciting developments in the BAM ALLIANCE community over the past few months has been the launch of [BAM Retirement Solutions](#). The new platform better addresses the challenges firms face in the retirement plan business and is supported by a new Retirement Solutions team, one that has deeper resources and expertise as well as upgraded materials and tools.

Along with a team that brings decades' worth of retirement experience, BAM has launched an all new Retirement Solutions website for advisors. This online tool was designed to distinctly support the retirement plan business of our advisors by putting the information they need to service 401(k) plans at their fingertips.



Advisors have easy access to an overview of their 401(k) clients as well as on-demand functionality so they can efficiently deliver professional, customized experiences to them. The site offers a level of integration with BAM's recordkeeping partners that allows access to critical plan-level information without ever leaving BAM's domain.

The BAM Retirement Solutions experience will

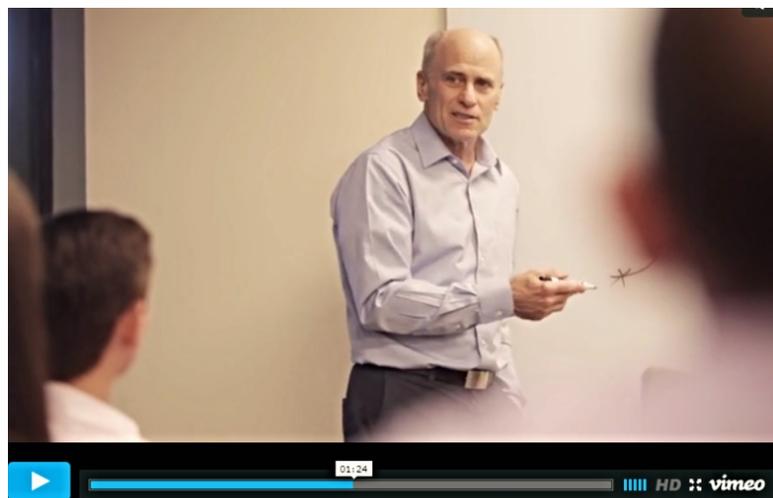
continue to evolve as we add new team members, tools and materials. Whether it's through the Web experience, one-on-one coaching with our 401(k) experts or dedicated on-site seminars, BAM continues to strive to provide best-in-class service to our advisors in the retirement-planning space.

A BAM ALLIANCE Foundational Film Featuring Larry Swedroe

We would like to share with you another one of our BAM ALLIANCE foundational films, which spotlight our National Thought Leaders describing who we are and what we do.

In this film, "The Science of Investing," Director of Research **Larry Swedroe** explains how we base everything we do and what we recommend on the latest academic research, not our opinion. Larry says: "Investing, in order to be successful, not only requires a deep knowledge of the theory of finance, an understanding of markets, but you also need a deep history to understand how markets work and what products mix well together to build a portfolio."

[Click here](#) or the image below to view this film.



Behind the History of BAM Advisor Services

BAM co-founder **Stuart Zimmerman** has written a three-part series on our new [BAM Advisor Services website](#)

that details the history of BAM and the BAM ALLIANCE. Stuart reflects on the evolution of BAM since it was founded in 1998 : "Today, firms from all over the country come to partner with and learn from us. We've expanded from just a handful of employees to an organization of more than 200 dedicated individuals serving advisors all over the country. Our thought leadership has written more than 20 books on our approach to investment and wealth management. Subject matter experts within the organization abound. Large investments in technology and other business resources have been made. ..."

Click the links below to access the articles in Stuart's series "Building BAM Advisor Services":

- [Behind the Vision](#)
- [Why I'm a Wealth Advisor](#)
- [The Power of People](#)

Join the Movement ... Join the BAM ALLIANCE

To have a conversation about becoming a member of the BAM ALLIANCE, please contact Brian Shapiro:

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