

## The BAM ALLIANCE ... By the Numbers

**\$25.7  
Billion**

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

*As of September 30, 2015*

**143**

Member firms in the BAM ALLIANCE

**9**

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

*As of September 2015*

**53**

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

*As of September 2015*

**65**

Total number of articles,

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.

### Brian Shapiro

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## The BAM ALLIANCE Has Strong Showing in Annual Wealth Magnets Rankings

Once again, members of the BAM ALLIANCE made a strong showing in *Accounting Today's* annual ranking of the top CPA firms ranked by AUM. In total, 54 BAM ALLIANCE members were represented across five categories:



- > The Billion Dollar Club
- > The \$100 Million-Plus Club
- > The \$50 Million-Plus Club
- > The Rising Stars
- > The Ones to Watch

To see the complete rankings, [click here](#).

## Staying the Course During Times of Market Volatility

Advisors can add tremendous value to their client relationships during times of high market volatility. Clients often feel stress and the pressure to do *something* as markets drop suddenly, sharply. This was the case this past August, as markets around the world experienced substantial losses. During this time, the BAM ALLIANCE leaned on its deep bench of National Thought Leaders to ease investors' concerns and carry the message of staying true to their long-term investment plan.

- [Advisors to Clients: Stay Calm and Carry On](#), by Manisha Thakor, director of wealth strategies for women

blog posts and videos that were added to the [Intelligence section](#) of the BAM ALLIANCE's website during the third quarter

> 51,000

Total number of Twitter followers for the BAM ALLIANCE's National Thought Leaders

- **BAM ALLIANCE Video: [Testing Your Mettle: Headlines, Market Swings and Your Financial Plan](#)**



- **[The Market Volatility Survival Tool: True Grit](#)**, by **Tim Maurer**, director of personal finance
- **[Staying the Course During Periods of Market Volatility](#)**, by **Jared Kizer**, chief investment officer

## Keynote Speakers Headline BAM ALLIANCE 2015 National Conference

One of our favorite traditions of fall is our annual conference, which brings together our community of advisors to hear insight from some of the brightest minds and most engaging speakers around. Later this month, the following marquee speakers will headline the BAM ALLIANCE 2015 National Conference in St. Louis:

**Frank Abagnale** is one of the world's most respected authorities on forgery, embezzlement and secure documents. More than 40 years ago, he was known as one of the world's most famous con men, and his story provided the inspiration for Steven Spielberg's 2002 film "Catch Me If You Can," starring Leonardo DiCaprio as Abagnale. Abagnale has been associated with the FBI for more than 35 years, and he lectures extensively at its academy and field offices.

**Sallie Krawcheck** is the chair of Ellevest, a global professional woman's network with thousands of women from across industries and around the world. Ellevest Asset Management has partnered with Pax World on the Pax Ellevest Global Woman's Index Fund, the first and only mutual fund of its kind, investing in the 400 top-rated companies in the world for advancing women. Krawcheck was named No. 9 on Fast Company's "100 Most Creative People 2014" list, as well as one of "10 Up and Coming Leaders to Watch" by *Entrepreneur* magazine.

**Robert Merton** is the resident scientist at Dimensional Holdings Inc. and is creator of Dimensional Managed DC. He focuses on the Target Retirement Solution, a global integrated retirement-funding solution system. Merton specializes in finance theory and serves on the faculty at both MIT and Harvard University. In 1997, he won the Alfred Nobel Memorial Prize in Economic Sciences for developing a new method to determine the value of

derivatives. This session will be moderated by Dimensional co-founder **David Booth**.

**Daniel Pink** is the author of five books about the changing world of work, including the long-running *New York Times* best-seller *A Whole New Mind* and the No. 1 *New York Times* best-seller *Drive*. Pink hosts "Crowd Control," a series on National Geographic Television that takes problems and creates solutions using unique design, technology and behavioral science principles. Pink's articles on business and technology have appeared in numerous publications, including *The New York Times*, *Harvard Business Review* and *Wired*. He has provided analysis of business trends on CNN, CNBC, ABC and NPR.

### **A BAM ALLIANCE Foundational Film: "A State of Heart" Featuring Tim Maurer**

Advisors who act as fiduciaries, as we do, are legally required to put the interest of their clients before everything else. As **Tim Maurer** says in this BAM ALLIANCE foundational film, "Fiduciary -- to me, to us -- is really about a state of heart, a state of mind. It's the way we operate. It's who we are. It's the only way we know how to do things."

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



### **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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