A FOCUS ON GROWTH

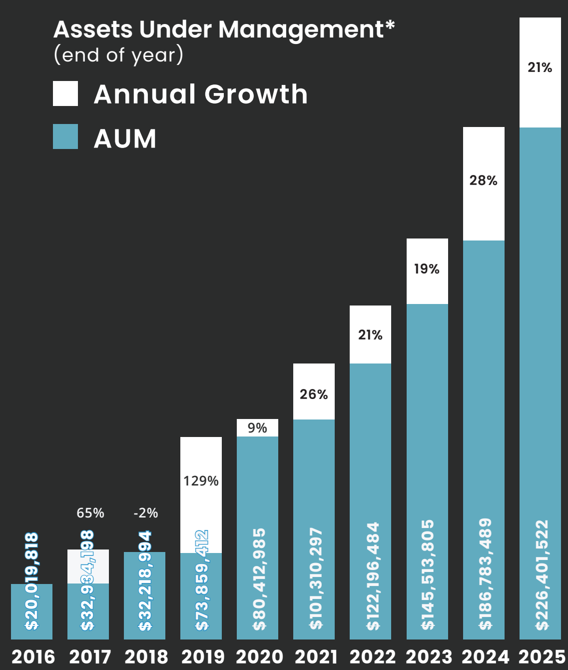
Case Study: Connected Wealth Solutions, LLC

"In 2016, we knew we wanted to start our own firm — but beyond the vision, we weren't sure where to begin. Building the infrastructure felt overwhelming: the systems, the operations, the processes... all the pieces required just to get off the ground. Partnering with Focus Partners Advisor Solutions helped lay that foundation. They provided the operational structure and guidance that allowed the firm to move from concept to reality.

As the firm grew, the partnership evolved with it. What started as support for the basics expanded into collaborative work around strategy, implementation, and case design. With that level of ongoing partnership, we've been able to grow our business from a start up to a standalone practice all while keeping overhead low and protect our most valuable resource: the time we spend with clients."

Brent Gunderson, CPA®
Owner & Wealth Advisor
Connected Wealth Solutions, LLC

Assets Under Management*
(end of year)



The Challenge:

Connected Wealth Solutions, LLC ("Connected Wealth") launched and immediately sought a partner to help guide their journey, one that would allow them to remain independent while bringing the experience and perspective Connected Wealth believed it needed to move forward with confidence.

Our Solution:

Focus Partners Advisor Solutions ("Focus") delivered the balance of independence and expertise Connected Wealth was seeking. By outsourcing trading and key operational functions, Connected Wealth was able to redirect time and energy toward client relationships and new business development.

As Focus has expanded its platform, Connected Wealth has gained access to investment strategies, solutions, and a due diligence framework that they believe would not be achievable within their existing team. This access has enabled them to address increasingly complex client needs without the distraction of operational, research, or execution demands, while remaining fully focused on clients and growth.

Beyond investment and operational support, Connected Wealth actively participates in the Focus advisor community through peer learning groups and national educational conferences. They have also leveraged practice management resources to launch annual client events and webinars, adopting a scalable one-to-many communication model that strengthens client engagement while maintaining a lean staffing structure.

*Connected Wealth joined as an independent member of the Focus Partners Advisor Solutions community in January 2016. Source: www.adviserinfo.sec.gov/. AUM growth is unique to Connected Wealth and others can't expect same or similar AUM growth. Growth is based on multiple factors such as market movement, clients onboarded, AUM of each client, and other unique factors to Connected Wealth.

Connected Wealth has not been paid for their name, likeness, or quote and is being provided solely as a case study to demonstrate the services Focus offers to advisors. Connected Wealth is an independent member of the Focus Partners Advisor Solutions community and uses the Focus Partners Advisor Solutions services and therefore has incentive to provide good feedback. The above quote represent the experience of Connected Wealth, experiences will vary. Connected Wealth was not the only independent Focus Partners Advisor Solutions advisor chosen to participate in these case studies.

FOCUS

Who We Are

We do more than streamline your back office—we empower financial advisors to elevate their practice and client relationships. Our suite of personalized, scalable solutions goes beyond a traditional TAMP, combining research-driven investment strategies, best practices, and hands-on support tailored to your needs. Whether you're looking to optimize operations, grow your firm, or enhance your client service, we're here to support every stage of your journey. With Focus, you'll gain the freedom to focus on what matters most: helping deliver exceptional value to your clients while building a sustainable future for your business.

Who We Serve

We partner with both seasoned advisors who are running substantial fee-based practices as well as startup firms with solid business plans focused on providing personal, comprehensive wealth planning. Collectively, Focus serves financial planners looking to make a difference in their clients' lives.

Why Partner With Us?

Our Core Solutions Are All-Inclusive
When you work with our team, you receive a suite of solutions designed to help power your dream practice.

A Planning Team At Your Fingertips
Centered on your client's goals and fueled by decades of peer-reviewed research and the industry's thought leaders, we help you create personalized plans based on reliable information and strategies.

A Network of Learning Opportunities
Our learning groups are designed to inspire robust peer-to-peer learning, creating a systematic and dynamic personal and professional development platform.

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Nearly
1,000
Advisor Network*

315+
Advisors With Us for 15 Years*

$50B**
AUM/AUA

25+
Years Serving Advisors*

* As of 4/30/2026, there are 983 independent members of the Focus Partners Advisor Solutions community, with 316 members being a part of the community for over 15 years. Prior to January 2025, Focus Partners Advisor Solutions was named Buckingham Strategic Partners, LLC.

** A of December 31, 2025, Focus Partners Advisor Solutions ("Focus") had $19.49 billion of discretionary regulatory assets under management and $16.91 billion of non-discretionary regulatory assets under management. In addition, Focus provides administrative, back office and retirement plan services to $14.09 billion of assets managed or advised by the independent firms that hire Focus for its services. In the aggregate, the total number of assets under management or administration was $50.59 billion.