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Why Choose Countiss Wealth?

At *Countiss Wealth Management (CWM)*, we are dedicated to empowering financial professionals by providing unparalleled administrative support, cutting-edge technology, and a collaborative work environment. We bring over 25 years of combined experience to help you grow and succeed.

CWM Offers

Supportive Work Environment

- ✓ A work culture that values independence and personal growth.
- ✓ Access to multiple veteran advisors ready to assist on your cases.
- ✓ Dedicated transition services for seamless client onboarding.
- ✓ Access to a Chief Investment Officer (CIO) for investment management assistance.

Admin and Growth Resources

- ✓ Comprehensive compliance, account service, and technology support.
- ✓ Marketing assistance to help grow your client base.
- ✓ Paraplanner

Competitive Benefits

- ✓ Competitive payouts for financial professionals.
- ✓ Company 401(k) plan with a 3% match.*
- ✓ Group health insurance (\$250 deductible).
- ✓ W2 and 1099 employment options

**Also available to 1099 advisors.*

Tech Stack

Countiss Wealth Management leverages best-in-class technology to streamline operations and provide superior client service:

Administrative & Operational Tools

-  Microsoft Teams & Microsoft Apps
-  Calendly
-  ClientWorks
- ✓ Advanced antivirus solutions

Financial Planning Software

-  eMoney
-  Wealthbox CRM
-  PreciseFP

Why Partner with CWM?

At CWM, we aim to make your transition effortless while equipping you with the tools to succeed. With our proven processes and dedicated team, you'll gain access to:

- ✓ Approach that fosters advisor success.
- ✓ Advanced internal systems to simplify operations.

Countiss Wealth Management is committed to helping you deliver the best outcomes for your clients while supporting your business growth. We look forward to partnering with you!