



30 Years as an Independent B/D – Looking Ahead to the Next 30

Thirty years ago Cambridge* set out to partner with trusted advisors to offer what is best for their independent businesses and their clients. Our founder and Chairman, Eric Schwartz**, acted with an inspired vision that led to an industry-wide paradigm shift: the creation of a hybrid model to support freedom of choice and open architecture fee and commission platforms. Today, we continue on the same path. Our choices are based on achieving mutual success in an innovative, friendly, and truly independent environment.

You control the journey.

We have embraced this statement because we recognize that you, an independent advisor, need to chart a course that works best for you and your clients. We feel strongly about delivering the flexibility, choice and innovative solutions you need to successfully run your independent business.

Your independence is not for sale.

We say that because we mean it. Our goal is for Cambridge to remain truly independent in structure and ownership. We have the legal structure, business plan and management team in place to achieve long-term success without sacrificing private ownership.

The future of your business is our priority.

Business continuity is one of the biggest concerns held by advisors. We are focused on our firm-wide initiative to help every Cambridge advisor have, at minimum, a personalized, written emergency succession plan in place.

We can help you define a written plan and funded solution.

In addition to helping advisors execute succession plans, we are responding to the critical need voiced by our advisors seeking a written plan that includes a funded solution. This means a Cambridge advisor may have access to a complete succession and continu-

ity package that we believe is not only innovative and effective, but unique across the industry.

We will help you navigate your path in an ever-changing regulatory environment.

We have one of the most flexible corporate RIAs in the industry and we offer you the choice of maintaining your RIA or joining ours. We will help you weigh the advantages and challenges, but we recognize the decision is yours.

We value your values.

We are proud that advisors who share our values of integrity, commitment, flexibility and kindness choose Cambridge. Together, we focus on a common priority – the client.

Selective advisors choose Cambridge.

We invite you to find out how we can help you meet the needs of your clients. Please contact us at 877-4BD-4RIA (877-423-4742) or visit www.joincambridge.com.

*Cambridge and its predecessor Broker/Dealer.

**Eric Schwartz was recognized in Investment Advisor's list of the 30 most influential people in the business over the past 30 years and those who will continue to influence the business in the future. May 2010.