DYNAMIC
Jim Cannon
Founder & CEO

At a time when technology steals the show as the foundation of a 21st century practice, I'm reminded of Dynamic's vision: To be the most compelling services partner to professionally managed wealth practices through innovation and an intentional balance of technology and people.

Our service model puts people first so that you can put your clients at the center of your universe. Despite the market environment in 2022, we've remained focused on developing actionable solutions to better serve our advisors and their clients.

To do that, we've not only invested in technology advancements, we've also invested in our people. This includes an expansion of our Investment Management team by 40 percent.

When it comes to optimizing both the advisor and client experience, advisors should look beyond the technology to the experience and talent of the people that make it happen. At Dynamic, it's an intentional balance.

Dynamic Advisor Solutions, LLC dba Dynamic Wealth Advisors
2415 East Camelback Road, Suite 700, Phoenix, AZ 85016 • DynamicAdvisorSolutions.com

Dynamic Advisor Solutions is a professional services provider for successful wealth advisors who value independence and desire to take their practices to the next level. With Dynamic's complete business solution, myVirtualPractice™, advisors can focus on deepening relationships with their clients, growing their businesses and living their dreams.

Dynamic was founded as a virtual business model in 2009 by Jim Cannon, a visionary executive and champion for independent financial advisors with a single mission: to advance the cause for independent advisors struggling with the day-to-day minutia of running and growing an efficient, productive practice while striving to enhance the customer experience in an increasingly complex, fiduciary world.

Dynamic's Investment Management team uses a risk-focused philosophy combined with a rules-based investment process to deliver enhanced, risk-adjusted returns as part of a Turnkey Asset Management Program. Additional professional services include: front/middle/back-office support, an integrated platform, compliance, consulting and practice development, retirement plan solutions and concierge services.

At the heart of these professional services is a people-first service model that provides the foundational support advisors need to put their clients at the center of their universe. Experienced, knowledgeable professionals across all areas of Dynamic do the work, alleviating advisors' need for staffing.

When independent advisors onboard with Dynamic, they have access to an instant team, vast resources and long-standing relationships with industry thought leaders, and an integrated platform with the best-of-fintech solutions to build a model wealth advisory practice for the 21st century.

Investment advisory services are offered through Dynamic Advisor Solutions, LLC, dba Dynamic Wealth Advisors, an SEC registered investment advisor.

New business contact:
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Type of program: Dynamic Investment Management is an all-in-one outsource solution, and an integrated tech platform. The program includes model portfolios, SMAs, direct indexing and alternatives including passive, active, multi-factor and alternative strategies. Overlays include risk-managed, tax-managed, yield-focused, and ESG.
Assets under management: $3.4 billion
Year program began: 2009
Managers on platform vetted: Yes
Managers GIPS® compliant: Some
Type of products available: Model portfolios, Separately Managed Accounts, Direct Indexing and Alternatives including passive, active, multi-factor, cash management, fixed income ladders, daily tax loss harvesting and alternative strategies.
Client reporting platform: Orion
Program is compatible for: RIAs, IARs, Plan Advisors
Program optimizes for tax and trading efficiency: Yes
Sleeve-level reporting: Yes
Program links to a trade execution or order management system: Eclipse
Program links to a trust accounting system: No
Private branding or white labeling possible: Yes
Proposal generator: Yes
Generates investment policy statements: N/A
Asset allocation methodologies: Strategic, Tactical, Multi-factor, Constant Weighing, Dynamic and Insured. Overlays include risk-managed, tax-managed, yield-focused and ESG
Rebalancing: Yes
Aggregation of held-away accounts: Yes, including participant 401(k) accounts
Custodians supported: Schwab, TD Ameritrade, Fidelity, Raymond James, Equity Trust, Vanguard, American Funds, Millennium Trust and Nationwide
Marketing support offered: Yes