ARLINGTON GROUP

Who We Are
How We Guide
Why It Matters

Objective guidance for financial advisors navigating growth, transition, and the most important decisions in the life of their business.

Built Around One Belief

> Advisors deserve objective guidance when evaluating opportunities that impact the future of their business. Not the fastest decision, not the easiest decision, **the right decision.**

Our Purpose

Help advisors navigate complexity with thoughtful conversations, informed perspective, and a trusted partner.

Our Role

Provide perspective, simplify complexity, and help advisors evaluate opportunities with clarity and confidence.

What We Believe

Every Journey Is Different

Guidance begins with understanding the advisor, not assuming the solution.

Objectivity Matters

The strongest decisions happen when advisors are informed and empowered.

Relationships Come First

Clients, teams, and business continuity stay at the center of every decision.

Growth Should Be Intentional

Best outcomes are built through thoughtful evaluation, not urgency or pressure.

Trust Changes Everything

When advisors feel supported and confident, better outcomes follow.

Major business decisions deserve more than assumptions, recruiting narratives, or pressure driven timelines.

They deserve CLARITY.

How We Guide

Arlington Group helps advisors navigate four critical areas through thoughtful evaluation, objective perspective, and advisor-centered guidance.

1. **Transitions & Platform Alignment**

   Evaluate long-term fit, tradeoffs, and implications of major business decisions.

2. **Growth & Recruiting**

   Ensure expansion remains aligned with long-term business goals and scalability.

3. **Succession & Continuity**

   Navigate legacy, client care, team stability, and future ownership with confidence.

4. **Mergers & Acquisitions**

   Assess acquisitions, partnerships, and strategic opportunities through a broader lens.

Our Approach

Every Situation Is Different

Arlington Group begins with listening. By understanding an advisor's goals, concerns, and vision, we facilitate more informed conversations and confident decisions.

> The strongest outcomes are achieved when advisors feel **informed, supported, and in control** of the decisions they make.

The Numbers Tell the Story

40%+

Advisors Retiring

Expected to retire within the next decade, increasing urgency around succession and continuity planning.

11,000+

Advisor Moves

Advisors changed firms in 2025 alone as firms competed for talent and alignment.

353

M&A Transactions

Wealth management M&A deals in 2024, reflecting continued consolidation across the industry.

More choices than ever: Advisors today can choose from a growing number of affiliation models, custodians, platforms, and partnership structures.

Why Guidance Matters

The Challenge

Most advisors evaluate high-stakes decisions while running their business, serving clients, and leading teams. The challenge is rarely a lack of options — it's finding **clarity among competing narratives.**

Common Questions Advisors Face

- Is my current platform still aligned with my goals?
- How should I think about succession?
- Am I positioned for growth?
- What options exist that I may not be considering?

Advisor Education & Resources

Arlington Group invests in advisor centered resources to simplify complexity and support thoughtful decisions.

Educational Content

Industry perspective, market commentary, and insight on advisor movement and affiliation models.

Planning Resources

Checkpoint assessments, readiness tools, and frameworks for informed decision-making.

Strategic Conversations

Helping advisors think clearly about transitions, M&A, recruiting, and succession.

Continuity Support

Resources for thoughtful conversations around clients, teams, and minimizing uncertainty during change.

Leadership Team

Decades of combined experience across advisor transitions, growth, operations, and strategic planning.

Jason Kuehn

President & Founder

20+ years helping advisors evaluate growth, transition, and breakaway opportunities.

Raylene Cromwell

VP, Advisor Engagement

10+ years designing advisor-centric transitions that protect client relationships.

Dylan Lee

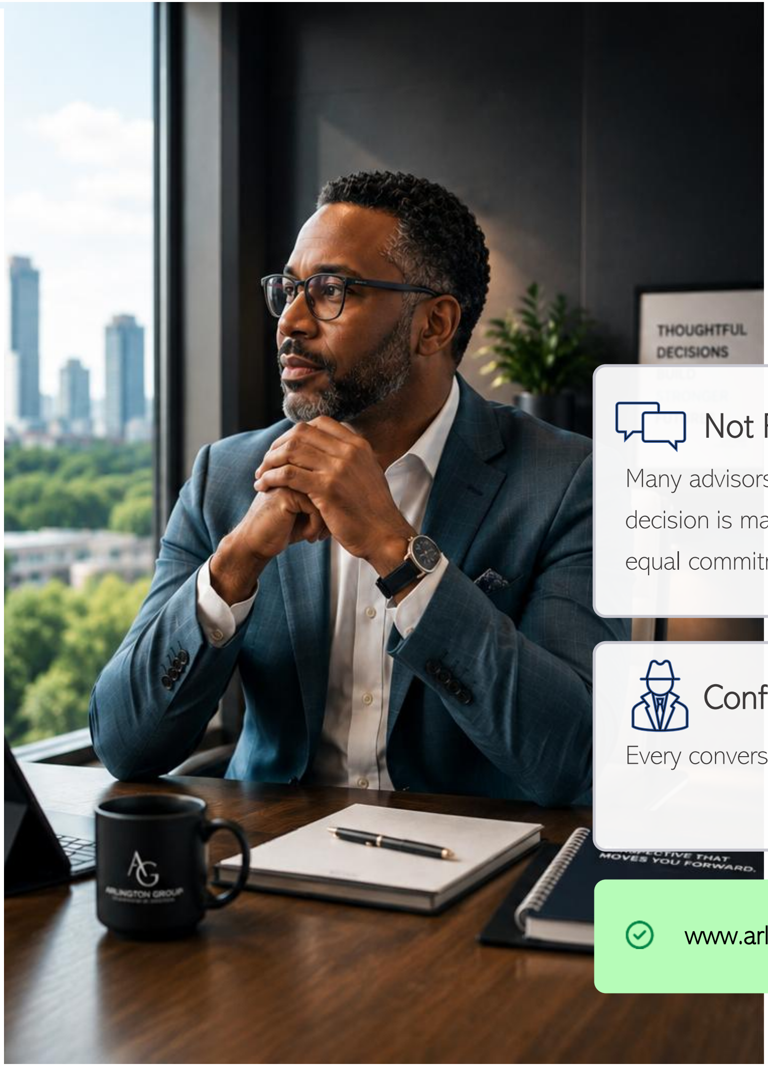
Director of Operations

Builds scalable systems across recruiting, onboarding, and post-move stabilization.

Steve Lee

Business Development

35+ years in investment, insurance, and sales leadership.



Let's Start the Conversation

Whether you're actively exploring or simply asking questions, thoughtful decisions start with informed conversations. **No pressure. No commitment. Just clarity.**

Not Ready to Move?

Many advisors engage long before any decision is made. Exploration does not equal commitment.

Completely Independent

We work across a broad network of firms and models, always advisor centered and focused on fit.

Confidential by Design

Every conversation is approached with professionalism, discretion, and respect.

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