

2021: The Year of the Breakaway Advisor



The challenges of 2020 stymied the plans of many advisors considering breaking away from their current firm, whether to go independent or join a new firm.



But rapid advances in advisor technology, combined with the hope of stability accelerated by the COVID-19 vaccine, have blown the road to independence wide open. This is 2021, the year of the breakaway advisor.

1 Personality

Hard-working, independent, resilient, resourceful

2 Characteristics

The Breakaway is characterized by a powerful desire for independence and an unwavering dedication to clients. Breakaways are resourceful and resilient, willing to take on the challenges of running their own firm or joining a new one in order to be able to provide conflict-free advice to their clients. They're also natural entrepreneurs, excited by the idea of leading and growing their own business.

3 Values

The Breakaway advisor values improved earning potential, access to powerful technology, robust transition support, work/life balance, growth opportunities, and the ability to focus on client experience.

4 Compatibility

Best Matches:

- Complete independence
- Independent B/D
- Hybrid RIA
- Independent RIA
- Powerful tech solutions, especially those that support a remote work environment

Worst Matches:

- Siloed, glitchy technology solutions
- Oppressive work environments
- Toxic company cultures

5 Breakaway's Fortune in 2021

The Year of the Breakaway Advisor begins at the intersection of challenge and opportunity—only from here can Breakaway advisors start their journey to independence. And while it won't always be easy, there will be plenty of support along the way: guidance from like-minded advisors, actionable practice management strategies, expert consultants, and powerful advisor technology solutions.

6 Seize the Year

2021 is yours. If you're ready to make your move, Orion is here to help. Visit our Breakaway Resource Center for valuable insights, timely content, exciting Breakaway events, and more!



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