

# WEARING TOO MANY HATS IN YOUR FIRM?

DISCOVER WHAT EAST BAY CAN DO FOR YOU

## WHY CHOOSE AN OCIO?

Working with a Fractional CIO, or Outsourced Chief Investment Officer (OCIO), can make a world of difference.

### THE LANDSCAPE

The most common challenges financial advisors face, according to The Impact of Outsourcing study\*, are scaling their business for growth and spending time on business-building activities.

### THE CHALLENGE

Even though the challenges are common doesn't mean overcoming them is easy. Playing too many roles in the firm often dilutes effectiveness and limits potential. So, the biggest challenge then becomes:

***How do you fulfill your fiduciary responsibilities and grow your firm without adding to your workload?***

\* - The Impact of Outsourcing, 2021

## THE SOLUTION

For many planning-focused advisors, this means obtaining support through a partnership with East Bay Investment Solutions that can free their time and allow them to focus on their clients.

Imagine having hours back in your week to pursue more fulfilling work for your firm and your clients. East Bay allows you to be more deliberate and thoughtful about how you can effectively grow your practice and provide the highest level of service to your clients.

## JOIN OUR EMAIL LIST

Get the latest insights, news, blog articles, and more from our team of experts by joining our email list. Scan the code to sign up today!





# EAST BAY

INVESTMENT SOLUTIONS

[www.eastbayis.com](http://www.eastbayis.com)

## ENGAGING WITH EAST BAY

At East Bay, we work with planning and relationship-focused advisors to enhance their investment offering and elevate their practice while freeing up their time to focus on what matters most to them.

## WHAT CAN WE HELP YOU WITH?

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Financial planning is your forte, but investments are still on your plate. You can hand over the heavy lift of investments to us while keeping your planning-centric approach.
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Feel like you're expected to be the all-knowing investment guru? We share the load and give more in-depth investment expertise.
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You get independent, trustworthy advice without a sales pitch.
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Hiring in-house might break the bank, and other outsourcing options haven't cut it. East Bay delivers a cost-effective, flat-fee solution.
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We provide a community of like-minded professionals where ideas and passion for financial planning converge.

## MYTHS VS. FACTS

*Let us put your mind at ease about what our outsourced solution looks like.*

### Myth #1: Using a Fractional CIO equals giving up control

With us, you will always maintain discretion and have the final say. The right OCIO like East Bay will actually grant you greater control and insight. With a combination of communication and adherence to your organization's best practices, we will be a trusted partner and unbiased third party that also has the bandwidth and expertise to do the deep dives into complex investment research and then supply you with the data and deliverables you need for informed decision-making.

### Myth #2: Using an OCIO means an advisor doesn't get to customize investments

A Fractional CIO provides a higher level of collaboration and flexibility than most other third party investment solutions. Unlike other solutions that deliver more "take it or leave it" options, an OCIO like East Bay can provide you with customized investment solutions so you and your clients can get exactly what you're looking for.

### Myth #3: Using a Fractional CIO takes away from an advisor's value

In fact, the opposite is true. Simply put: engaging with a Fractional CIO saves you valuable time so you can spend more time on your current client relationships and build your business. This can actually help increase your credibility with clients and your firm as well as enhance your overall value because of the additional expertise an OCIO offers.

## WHAT OUR CLIENTS SAY

★★★★★

**"Working with Eric and Mario has been transformative for our firm. One of the best 'big steps' we've ever taken."**

- David S., CFP®, President

★★★★★

**"I continue to be impressed with East Bay's responsiveness, diligence, and ability to distill down complex issues into understandable key points. You are a great resource!"**

- Giff L., Partner

★★★★★

**"I truly value your time and expertise. You always present the information in such a clear, relevant way."**

- Bridget G., CFP®, Founder

★★★★★

**"We are grateful for the way East Bay is building the advisor community around them, exploring the best resources around the industry and introducing their clients to them. Specifically, they recently introduced us to a top-tier separate account manager and a fantastic compliance consultant."**

- Linda C., CFP®, CeFT®, President

These statements are from a current or then-current East Bay client who was not compensated for it, and no conflict of interest exists between them and East Bay Investment Solutions.