

MICHIGAN WEALTH GUIDE

AQUEST WEALTH STRATEGIES

Advisors for Today's Busy, Plugged-In Investors



AQuest Wealth Strategies' staff is committed to the communities it serves. Concerned about the erosion of the middle class, Dr. Jason Van Duyn established the Wealth Planning Foundation, a philanthropic organization dedicated to raising financial literacy.

"CHALLENGING THE STATUS QUO IS NOT FOR THE FAINT OF HEART. BUT "THE WAY IT'S ALWAYS BEEN DONE" DOESN'T HAVE A CHANCE WHEN TACKLED BY THOSE WHO ARE DRIVEN BY A PASSION TO CHANGE PEOPLE'S LIVES."

It's Not Just the Digital Difference

A funny thing happened on the way to the 21st century. The financial services industries decided not to come along. Clinging to antiquated paper-based office processes and anchored to brick and mortar, a large percentage of financial advisors are conducting their practice the same way they've done it for decades.

"The industry is resistant to change, due in large part to aging demographics. More advisors are over age 80 than under 30," says Dr. Jason Van Duyn, CFP®, ChFC®, CLU®, MBA – President and founder of AQuest Wealth Strategies, partnered with LPL Financial, in Sterling Heights, Michigan.

Get Ready for a Game Changer.

AQuest represents the next generation of financial services. Founded in 2009, it uses Van Duyn's trademarked business process "Transition to Freedom™," a fresh, innovative approach to helping financial advisors transition to the next stage of life. The process allows advisors to monetize their business immediately while having a flexible retirement date. The T2F process also passes through 100% of revenue generated by the book of business to the selling advisor during the transition period, which can last several years. Including this pass-through, the selling advisor could reap as much as twice the typical valuation for their practice.

"We are fortunate to have an experienced staff that is far younger than the average for our industry. They eagerly embrace new technologies, such as cloud-based systems, that completely eliminate the need for paper, make information available from any place with an internet connection, and allow us to schedule virtual meetings with clients," says Van Duyn who was one of *InvestmentNews*' 40 top advisors in the United States under 40 in 2014.*

Tech-savvy investors of any age and busy younger families with longer time horizons have driven AQuest's growth from \$12M in assets under management to \$135M today. It's not just new technology that attracts new clients, but a new way of looking at financial services.

Van Duyn has assembled what he believes to be a Dream Team of advisers with diverse backgrounds and extensive expertise under one roof. Completely independent, AQuest has the freedom to offer a true open architecture platform. Clients are not limited in the products or services they choose and can opt to work based either on commission or fee, or a combination of both.

AQuest has professionals with extensive tax experience, this allows the team to take a more comprehensive review than typical advisors who primarily look at securities. AQuest's staff can go beyond the historic role of advisors to provide tax planning and guidance for challenges small business owners and highly paid executives face. "Our philosophy is to align all areas of a client's financial world to work cohesively as we strive to create maximum tax savings and long-term investment returns," says Van Duyn.

Challenging the status quo is not for the faint of heart. But "the way it's always been done" doesn't have a chance when tackled by those who are driven by a passion to change people's lives.

AQUEST WEALTH STRATEGIES
Your Financial Future Begins with AQUEST

44028 Mound Road, Suite 4
Sterling Heights, MI 48314 | 586.731.6020
aquestwealth.com | aquestwealth@aquestwealth.com

Securities and Advisory Services offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC. LPL Financial does not provide tax advice or services.