



# RIA Partnership Platform

*from* HIGHLAND CAPITAL BROKERAGE



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CAPITAL BROKERAGE



## Integrated risk management

At Highland, we believe integrated advice — bringing together wealth and risk management — delivers higher-quality consultation with superior value to clients.



### Expert Guidance

We provide the expertise to easily integrate life insurance and annuity strategies, making the complex understandable for both you and your clients.



### Transparent Solutions

We know which insurance and annuity strategies fit and where they don't, and will always guide you in the right direction.



### End-to-End Support

Highland offers tailored end-to-end support, whether transactional business or complex cases, according to your needs to comprehensively serve you and your clients throughout the entire sales process.



### Comprehensive Security

We understand the liabilities you take on daily. That's why we invested early to become SOC 2-compliant,<sup>1</sup> a differentiating level of protection for you and your clients' data.

<sup>1</sup> SOC 2 is an auditing procedure that ensures secure management of data for both organizations and clients.

# Supporting your practice

## Empowering you to deliver more value with less friction:

- Position you as the go-to expert for holistic financial advice.
- Increase retention and deepen client relationships.
- Expand your offering with integrated wealth and risk management.
- Save you time with seamless case design, processing, and support.
- Equip you with technology and tools to scale your practice efficiently.
- Support every recommendation with a process designed to help meet fiduciary standards.

# by supporting your clients

## Better outcomes through your expert guidance:

- Personalized, goal-based financial strategies.
- Protection and growth aligned under one plan.
- Confident decision-making with expert guidance.
- Seamless, professional client experience.
- Comprehensive planning for life's uncertainties.

## Creating a streamlined, hassle-free process



Consult with credentialed representatives.



Design unbiased strategies for your clients.



Provide tailored collateral outlining strategies.



Smooth processing with professional case management and underwriting specialists.



Achieve maximum client success



# Choose how you want to be served

Highland services the entire wealth spectrum.



Mass Affluent

Super Affluent

Ultra-High-Net-Worth

Transactional/  
Sales Desk

Point-of-Sale/  
Planning

## Compensation

We'll *never* compete for assets. Instead, we provide flexible compensation structures that grow with your firm — ensuring your rewards are always aligned with the value delivered.

We help you differentiate your firm, expand into new markets and deliver the kind of advanced planning today's marquee clients expect.

## We're excited to partner with you

and guide you through the implementation of comprehensive financial strategies via life insurance, annuity, longevity planning, and disability insurance.



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Schedule  
your meeting.

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