

FREEDOM | FLEXIBILITY | CONTROL | OWNERSHIP

With an entrepreneurial spirit, Matt Liebman, Aaron Marks and their team grew a successful business at Merrill Lynch. Over time, the team began to explore options that would enable them to have the final say on how to best serve their clients. As the team started their due diligence process, it became abundantly clear over time they desired to own a fully independent RIA firm, free from corporate constraints and the ability to place their clients' interests first, above everything else. To compete at the highest level, the team began the search for a supportive partner with an open-architecture platform that would enable them to keep 100% ownership and full control of the business, with the freedom to serve clients objectively and with full transparency.



"THE OVERWHELMING MAJORITY OF OUR CLIENTS ENTHUSIASTICALLY CAME WITH US AND SOME ASKED US TO OVERSEE MORE OF THEIR ASSETS, WHILE OTHERS POINTED BRAND-NEW BUSINESS OUR WAY."

MATT LIEBMAN, CEO

Leveraging the Power of Supported Independence™

By partnering with Dynasty's experienced, hands-on Transition Team, Amplius leveraged Dynasty's detailed Pro Forma financial projections which led to a clear transition roadmap. Through Dynasty's extensive Brand DNA process, Amplius Wealth Advisors brand was born. Amplius employed Dynasty's comprehensive investment and wealth management platform and utilized Dynasty's customized tech stack to create personalized segmentation and engagement with clients. Amplius worked with Dynasty's robust business planning process, enabling them to create a positive culture, a more profitable business and increased client enthusiasm.

The Clear Benefits of Partnering with Dynasty

1. **Entrepreneurs Powering Entrepreneurs** - Access to expertise and leadership that values and understands the need to focus on future growth while strengthening existing client relationships.
2. **Full Control** - With 100% ownership, Amplius maintains control while being fully supported.
3. **Client Focus** - Expertise in marketing, compliance, finance, tech, and operations, all partnering with Amplius, creating synthetic scale for greater team efficiency and growth.
4. **Open Architecture Platform** - Integrated tech to scale the business and improve the client experience, which ultimately drives increased loyalty, advocacy and long-term enterprise value of the business.

Benefits for Amplius

- + Increased margin & enterprise value
- + Unhindered access to investment offerings
- + Strategic M&A and Capital Strategies support
- + Thoughtful succession planning guidance
- + No longer subject to outside management

Benefits to Clients

- + A fresh and innovative approach to wealth management resulting in stronger relationships
- + Access to a broader set of customized products & solutions
- + Working with a true fiduciary that will put their best interests first