



BROKERS ALLIANCE · PARTNER ACCESS

Expand What You Can Offer Your Clients

Investment and wealth management resources for today's insurance professional.

Up to 50%

of advisory fees paid to you monthly, for every client you refer to Acrylic

No License

needed in select states to refer clients under a Solicitor's Agreement

A Few Days

is the typical timeline for agents to get set up and active with Neil

WHAT'S AVAILABLE TO YOU

WEALTH MANAGEMENT

Acrylic Financial

A fee-only Registered Investment Adviser based in Fountain Hills, AZ. Manages portfolios and financial planning for your clients, clears through Schwab, and pays out monthly. Four portfolio strategies, including an in-house hedge fund most retail advisors can't access.

BROKER-DEALER ACCESS

Brooklight Place Securities

Founded in 1984. FINRA and SIPC member, licensed in all 50 states. Gives you access to mutual funds, stocks, bonds, and variable products. Your existing BA insurance production counts toward your grid level.

HOW THE REFERRAL INCOME WORKS

- 1 Sign the Solicitor's Agreement.** Neil walks you through it, and it only takes a few minutes.
- 2 Refer a client** with investable assets to Acrylic. You just make the introduction.
- 3 Acrylic manages everything** — the account, the compliance, and the client communication.
- 4 You get paid monthly**, for as long as that client stays with Acrylic.

FOUR WAYS TO WORK WITH ACRYLIC

Solicitor's Agreement

Refer clients, earn up to 50% monthly. No securities license needed in select states. Where most BA agents start.

Series 65 or 7 & 66

Already licensed? Become an IAR and manage client accounts directly with Acrylic.

ChFC or CFP

Certain designations may qualify you to work with Acrylic without a securities license.

Straight Referral

No agreement, no ongoing income. Send a client Neil's way to test the relationship first.

Book a 15-Minute Call with Neil

He manages both partnerships for Brokers Alliance. One call answers everything. No prep needed, no sales pitch.

Neil Sabagh

Partner Relations, Brokers Alliance

Call (480) 816-9000 ext. 152

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