

# Finding the right fit:

A checklist to help determine the RIA firm for you



Whether you're looking to leverage the scale of a partner firm or searching for a successor, you may want to consider joining an existing firm. Doing so may allow you to build off of an existing firm's infrastructure, processes, brand recognition, and more. If this sounds like the path for you, use the checklist below to help you find the RIA firm that could be the right match.



## Culture

- The firm's values align with mine.
- I agree with the firm's pricing structure.
- I share a similar vision with the firm's partners.



## Technology

- The firm has the technology necessary to stay efficient.
- The firm uses technology to provide a better client experience.
- The firm is willing to explore and invest in new technology when necessary.



## Income

- The non-monetary benefits the firm offers are attractive to me.
- The firm's pricing structure will be beneficial to my income.
- If I'm becoming a partner, I'm comfortable with the buy-in requirements.



## Growth

- The firm has a clear strategy for helping me find new clients.
- There is a well-planned path for career growth.
- The firm is willing to invest in educational opportunities.



## Other considerations

- The firm will provide me with the staff and/or support I need to properly serve my clients.
- The firm uses a reputable custodian I can trust.
- The firm will provide the support I need as I transition.

Contact us by calling 800-934-6124 or visiting [tdainstitutional.com](https://tdainstitutional.com).