

Pinnacle Advisor Solutions Announces Alliance with Back Office Advisor, LLC

Business Solutions for Advisors by Advisors: another new alliance to offer advisors a unique, low-cost opportunity to understand what discrete, manageable steps can be taken in 2012 to make the business more effective.

(February 21, 2012 – COLUMBIA, MARYLAND) Pinnacle Advisor Solutions (www.PinnacleAdvisorSolutions.com), a leading provider of comprehensive business solutions for emerging advisors is announcing an alliance with Back Office Advisor, LLC, a leading practice management firm focused on strategic business planning including vision/goals, marketing strategy, client experience, staffing and succession planning.

In partnership with Pinnacle Advisor Solutions, Back Office Advisor is now offering a unique, low-cost opportunity to understand what steps an advisor can take in 2012 to make the business more effective with both the near-term and long-term in mind. This opportunity is specifically designed for advisors who need to create a strategic blueprint to ensure their efforts result in the business success they expect.

“In an increasingly complex and competitive business environment, strategic business planning is vital to success,” stated John Hill, CEO of parent company Pinnacle Advisory Group and the newly-formed Pinnacle Advisor Solutions. “Knowing that building a business can be a seemingly daunting task, especially when advisors are already so time-constrained, working with a leader in the field to break-down the effort into manageable and affordable tasks is invaluable.”

Following an initial conversation with the advisor and the completion of a discovery questionnaire, Back Office Advisor will deliver a Comprehensive Firm Review that examines the firm’s vision/mission/goals, marketing, client service, staffing and operations with an eye toward where the advisor wants to take the firm. The review will include recommendations and resources that address key issues as well as an action list for the advisor. And in order to make the Comprehensive Firm Review an affordable first step for emerging advisors, it will be available for only \$1000 for practices with up to three employees, \$1500 for practices with four to seven employees and \$2000 for practices with more than seven employees. To make the offer still more affordable, Pinnacle Advisor Solutions has agreed to reimburse the fee for those advisors who subsequently choose to partner with Pinnacle Advisor Solutions for its risk-managed investment solutions and strategic business consulting as part of its strategic game plan.

“Advisors can no longer rely on the tailwind of a secular bull market to grow their businesses for them”, stated Ginny Hudgens, president of Back Office Advisor, “For the first time, many advisors are faced with the fact that they are both financial advisors AND small business owners responsible for establishing and executing on a strategic plan for their businesses to succeed.”

About Back Office Advisor LLC

Back Office Advisor is a leading practice management firm focused on strategic business planning. The firm’s mission is to assist financial planners and investment advisors in building their perfect business which will allow them to achieve their ideal quality of life. The firm provides one-on-one assistance with strategy, business development and hands on implementation. (www.BackOfficeAdvisor.com)

About Pinnacle Advisor Solutions

Pinnacle Advisor Solutions is a new division of Pinnacle Advisory Group that offers comprehensive, custom and private-label business solutions to emerging independent financial advisors who are committed to growing their firm profitably and developing the practice they always wanted. Designed by advisors for advisors, these solutions are proven in the field to (a) free advisor time to grow their firms, (b) produce alpha and reduce downside capture in volatile investment markets, (c) build equity in the business and (d) improve compliance. In addition to more than twenty-years of experience growing its own firm to more than 700 families and over \$1 billion AUM, these solutions incorporate more than a year of direct interviews with independent financial advisors. (www.PinnacleAdvisorSolutions.com)

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