



A TRUE PARTNERSHIP FOR ADVISORS READY TO BUILD

Why experienced, planning-focused advisors are joining Zelos Investment Counsel

WHY ADVISORS ARE MAKING THE MOVE



True Partnership, Real Equity

Genuine incorporation with a real path to equity ownership, not just revenue share, positioning you for the lifetime capital gains exemption on a future, properly structured sale. A seat at the table on every major firm decision.



Hand Off Portfolio Management

Access institutional-quality model portfolios and pools so you can step back from day-to-day investment management and focus on what actually grows your business: planning, client service and development.



Top-Tier, 85% Payout

A preferential grid rewards top producers with our highest marginal tier, up to an 85% payout, and you keep 100% of your insurance economics.



Build Your Own Brand

Lead with your own brand and build your practice your way, free from rigid institutional identity, sales quotas or a parent bank's agenda. Regulatory documents and footnotes simply reference Zelos.

ZELOS AT A GLANCE



10+ Years

In operation – incorporated June 2016



<\$100M AUM

Assets under management



PM · IFM · EMD

Fully registered as Portfolio Manager, Investment Fund Manager & Exempt Market Dealer



Up to 85%

Payout at our highest marginal grid tier



100%

Of insurance economics retained by you

Interested in learning more? Let's have a confidential conversation.

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