

Strategic Growth for Financial Advisors, Simplified

Smart solutions for financial professionals — by financial professionals

Who We Help: Financial Advisors at Any Stage



Independent advisors

Advisors seeking structure, support and sustainable scale



RIA firm owners

Leaders aiming to grow AUM, streamline operations and expand teams



Succession-minded teams

Firms planning continuity or preparing for exit planning or acquisition



Holistic financial planners

Advisors offering comprehensive planning with long-term client impact



Insurance pros

Advisors focused on annuities, life insurance and protection strategies



Fast-growth wealth managers

Advisors rapidly expanding and seeking flexible systems and enterprise value

We work with you when you're ready to scale, systemize and succeed.

5 Strategic Solutions for Advisor Growth

Strategic & business growth

01

Full-service corporate RIA

Operate with confidence through comprehensive RIA infrastructure — from compliance to billing.

02

Turnkey asset management program (TAMP)

Deliver tailored portfolios with integrated tech, trading support and adaptable investment models.

03

Holistic marketing & brand strategy

Attract ideal clients with compliant branding, lead generation and targeted campaigns.

04

Insurance planning & product platform

Offer advanced protection strategies backed by full-service product support.

05

Proven processes & coaching

Leverage playbooks and coaching from Clarity 2 Prosperity to streamline your firm's growth.

Outcomes You Can Expect



Grow AUM with clarity

Drive revenue with intentional planning and flexible systems.



Expand teams and roles

Build a practice that supports growth — not just sales.



Increase enterprise value

Prepare your firm for transition, continuity or acquisition.



Improve retention and satisfaction

Deliver ongoing, engaging experiences that build loyalty.



Streamline operations

Reduce friction with integrated platforms and aligned processes.

C2P client Scott Kaup increased his firm's AUM by 33% in 2 months.

Joe DiSalvo grew his revenue from \$80 million to \$133 million with C2P.

How We Deliver Growth



Holistic planning

- The Bucket Plan®
- Tax Management Journey®
- High-net-worth/advanced planning strategies



Practice management

- The Teamwork Movement
- Advisor Career Path and Compensation
- Business operation efficiency
- M&A and expansion
- Hiring, onboarding and training



Marketing programs

- Marketing planning and strategy
- Digital marketing
- Virtual and In-person seminars
- Design services



Profitable business lines

- The Rainmaker Multiplier
- Building or buying a tax practice
- Adding a Medicare practice
- Insurance and AUM-building strategies
- Charging planning, consulting and subscription fees

E-learning
Experiential training
On-demand mentors
Education and engagement events

Meet C2P

C2P is your strategic growth advisor and business growth partner. And we're with you for the long haul.



Schedule a Call