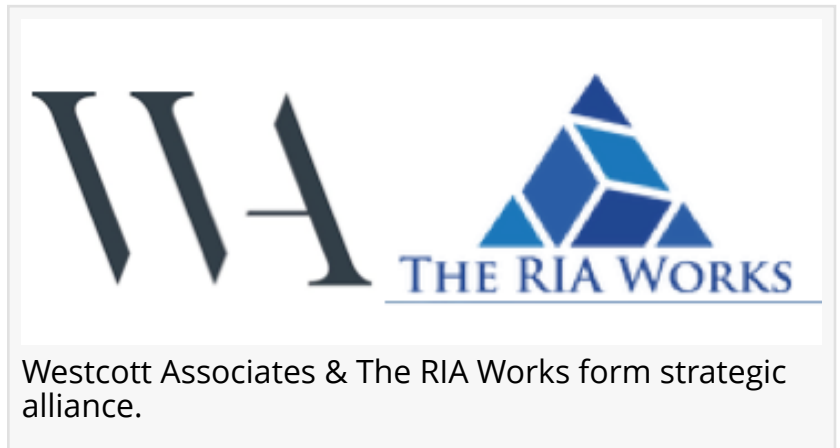




# Westcott Associates and The RIA Works Announce a Strategic Partnership:

*Financial Advisor Transition, Marketing and Consulting Services*

BEDFORD CORNERS, NY, UNITED STATES, September 30, 2019 /EINPresswire.com/ -- Westcott Associates & The RIA Works announced today that they will combine their experienced teams in a strategic partnership to provide transition, [marketing](#) and consulting services to financial advisor teams and individuals. Working with a select group of advisors, The RIA Works and Westcott



Associates have launched more than 75 firms together and separately.

"I founded The RIA Works two years ago and ever since we have been running flat out to keep up with our amazing growth," said Becca Knauss, Founder and CEO of The RIA Works®, which is based in Chicago, Illinois. "I believe this strategic partnership with Westcott Associates, along with others, will help us provide more of the quality services RIAs and advisors are looking for." Based in Bedford Corners, NY, Westcott Associates is celebrating its ninth year in business. President and CMO David Westcott sees this as the evolution of his 25-year career in financial services.

"Combining Westcott's marketing expertise with the transition and consulting businesses of The RIA Works will enable advisors to find a one-stop shop to help them transition to independence or take their business to the next level, without sacrificing ownership or control," said Westcott. Both Knauss and Westcott worked together at Dynasty Financial Partners and Sanctuary Wealth in their critical first years of business. In addition, Knauss worked at High Tower as they developed their business models.

"We were both there at the beginning of the real growth phase of the RIA Industry and understand its strengths and weaknesses," said Westcott. "It's hard to find people with our experience in the industry, so it's natural for advisor teams to call on us to guide them towards independence."

"My work at High Tower, Dynasty and many other firms taught me that transitioning to independence, or any one of the ten or so models, can be a complicated process," said Knauss. "It should be carefully thought out before an advisor makes a choice. It is our job to help them choose the right path and make their transition as smooth as possible."

The combined strength of the firm will offer complete transition, marketing, PR, writing, video and consulting services for advisors considering transitioning their businesses or growing existing businesses.

More information about the services offered by Westcott Associates or The RIA Works can be found [www.theriaworks.com](http://www.theriaworks.com) or [www.westcottamm.com](http://www.westcottamm.com)

About Westcott Associates Marketing & Media ®

Westcott Associates is a boutique marketing firm founded in 2010. It specializes in marketing, digital media and communications for financial services firms and professionals. The firm's extensive knowledge of this industry draws upon years of working with [financial advisors](#), RIAs,

broker-dealers, and firms of all sizes. This strong foundation sets Westcott apart from its competitors who are often less familiar with the sophisticated work advisors do for their clients.

#### About The RIA Works®

The RIA Works was founded in 2017 with a focus on three services: The RIA EDGE, which focuses on all forms of transitions such as wirehouse and broker dealer breakaways, breaks from aggregators or existing RIAs, to splitting from an existing team, and additional services including due diligence, planning and execution. The RIA NEXT focuses on an ongoing operational and advice support model, focusing on best practices, workflows and on overall outsourced COO. The RIA TRAJECTORY provides guidance's around acquisition, M&A, resource partners and integrated services.

DAVID WESTCOTT  
WESTCOTT ASSOCIATES Marketing & Media  
+1 914-672-0892

[email us here](#)

Visit us on social media:

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