

3xEquity Launches Annual Advisor Transition Survey

3xEquity, the authority on advisor transitions, has launched its 2021 survey of financial advisors who have recently switched broker-dealers/firms.

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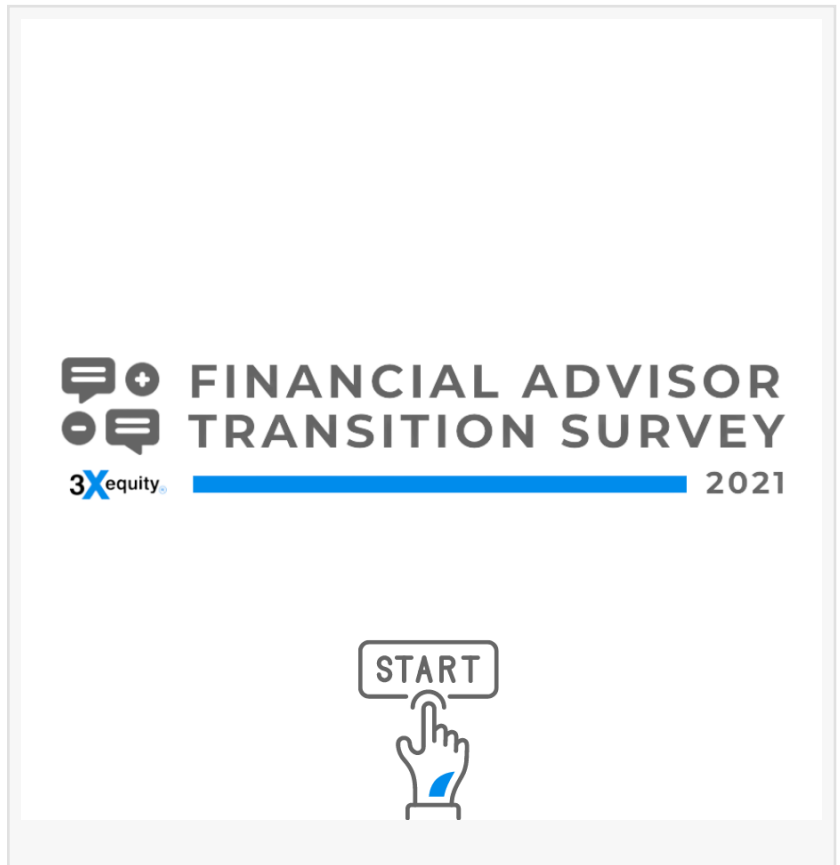
3xEquity, the authority on advisor transitions, has launched its [2021 survey of financial advisors](#) who have recently switched broker-dealers. This year's survey builds on prior-year learnings and introduces conditional logic to provide a quick and easy user experience. In most cases, advisors can complete the survey in under 3 minutes.

"Last year's survey provided some unique insights into the minds of advisors who had just moved to a new broker-dealer, both good and bad. Our goal is that this survey acts as a catalyst for improvements on both sides of a transition - creating a better experience for advisors and for the firms who are recruiting them," noted 3xEquity Founder & CEO Jeff Crosby.

Questions cover a range of topics including the logistics of securing offers, the promises of switching to a new firm, and the realities of moving assets. Prior survey data has proven valuable to advisors who are looking for guidance on making a move. Advisors who are curious about a move are encouraged to download a copy of the 2020 report on the 3xEquity website.

Survey respondents remain 100% anonymous and receive a copy of the report upon publishing. In addition, 3xEquity will award \$200 Amazon.com gift cards to 3 advisors chosen at random from all submitted replies.

To take the survey, as well as to download the 2020 Advisor Transition Survey report, visit www.3xEquity.com/survey.





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Jeff Crosby

About 3xEquity:

3xEquity helps advisors significantly speed up the process of finding their best fit. From securing multiple offers while keeping the advisor 100% anonymous to managing the transition journey (including helping negotiate the largest payouts), we empower advisors to control the conversation. Curious about switching to a new broker-dealer? Get started right now at www.3xequity.com.

Jeff Crosby

3xEquity

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