

# CreativeOne Securities and CreativeOne Wealth Earn Top Industry Recognition

*Kansas City's CreativeOne Securities and CreativeOne Wealth among distinguished in U.S.*

KANSAS CITY, MISSOURI, UNITED STATES, January 24, 2024 /EINPresswire.com/ -- Kansas City-area based [CreativeOne](#), announces outstanding achievements of its family of companies, [CreativeOne Securities](#), an independent broker-dealer and [CreativeOne Wealth](#), a Registered Investment Advisory (RIA) firm to solidify their positions as leaders in the financial services industry.

CreativeOne Securities, a privately owned, independent broker-dealer was selected for SmartAsset's 100 Fastest-Growing RIAs of 2023. CreativeOne Securities' RIA secured 53rd place among U.S. firms. This recognition underscores a decade-long commitment to client success. In a RIA-growth landscape dominated by acquisitions, it's notable that our advisors are consistently growing their clients' wealth beyond other firms.

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This expansion reflects both the organic growth in our advisor community and a strong commitment to our firm's core values.”

*Jeff Eisenhauer*



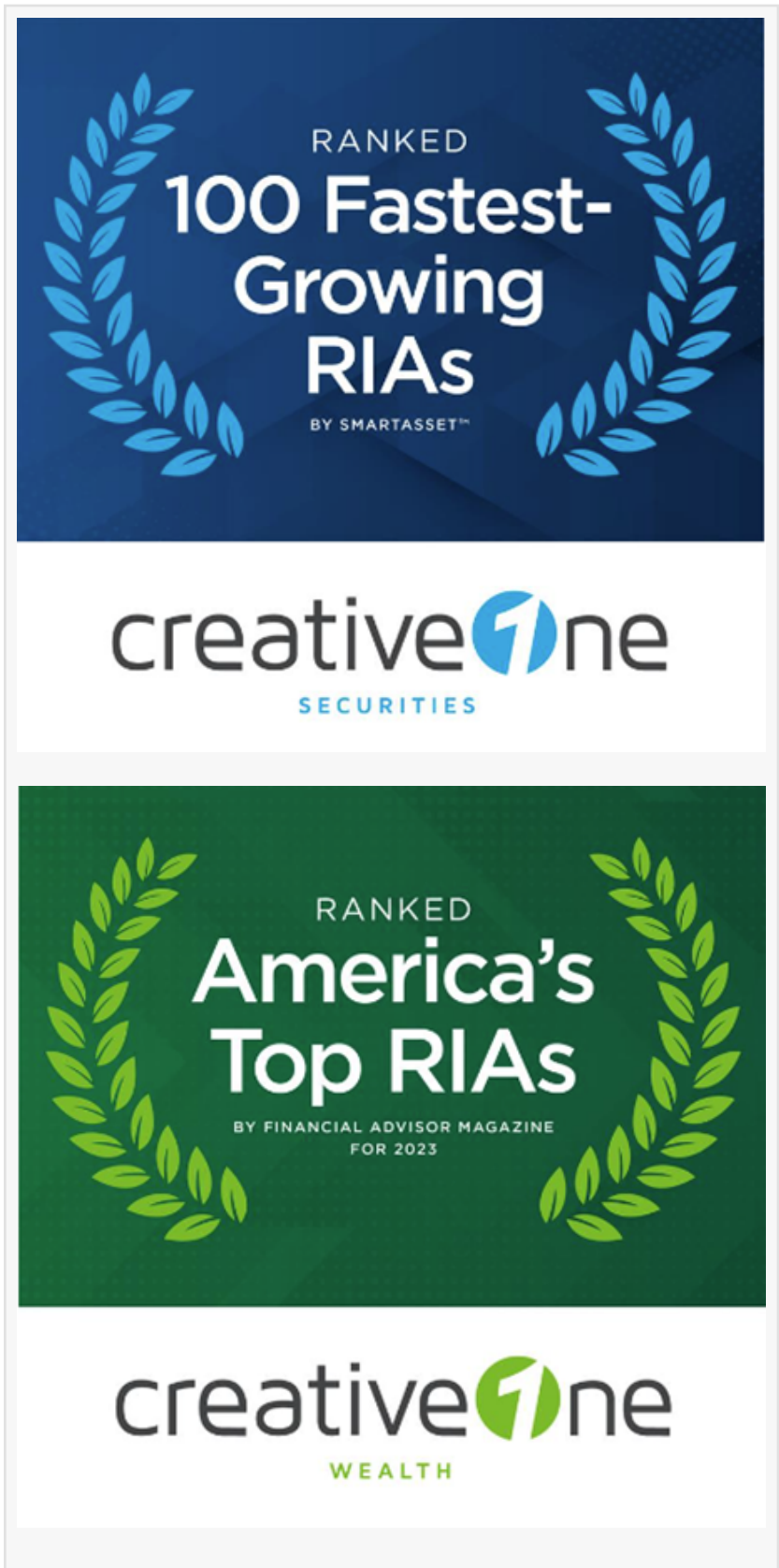
Jeff Eisenhauer, President and Chief Compliance Officer, CreativeOne Securities

CreativeOne provides nearly 200 advisors and representatives with extensive access to leading investment and management tools, enabling them to operate their business with greater efficiency. This affords additional time for client interactions, resulting in enhanced overall client experiences. “One of our core focuses since I've led the firm, is focusing on building a deep client-centric experience. Our boutique-level service

is sought after, leading to a 40% year-over-year growth over the past four years, coupled with a 98% representative retention rate since our inception,” said Jeff Eisenhauer, President and Chief Compliance Officer, at CreativeOne Securities. Key factors contributing to this success are the quality of relationships and our unwavering commitment to customer service. Notably, our 2023 Net Promoter Score of 84 surpasses that of client-centric giants like Apple, Amazon, and Netflix.

In addition to the noteworthy achievements of CreativeOne Securities' RIA, CreativeOne Wealth's corporate RIA has also been included in Financial Advisor magazine's Top 2023 RIAs. In a span of just eight years, CreativeOne Wealth has secured a position among the Top 2023 RIAs in the country. President, Marty Pfannenstiel, J.D. attributes this rapid success to client-centric approaches and robust tools to help entrepreneurs grow their practice. “Advisors have been drawn to the firm by growth-focused strategies, evident in our top 10 offices which boast an impressive 41% average growth rate since appointing with CreativeOne Wealth,” said Pfannenstiel. Remarkably, within these top offices the average practice has been with us for just 2.6 years. Our team's focus on enhancing business efficiencies, providing coaching, and offering robust lead generation solutions have played a pivotal role in fostering growth. We're helping independent advisors compete against household names and we're helping them build significant growth tracks.

In a little over a decade, the family of CreativeOne companies has experienced impressive



growth, represented nearly 400 advisors and registered representatives, have established two RIAs, inaugurated our first retail office, and maintained a steadfast focus on advisor development. And now, managing nearly \$8 billion in assets under advisement with Pershing, Fidelity, and Charles Schwab. This rapid, organic client growth stands out in an industry where growth is largely influenced by mergers, reflecting our commitment to the independent, entrepreneurial spirit by providing a fresh, distinctive edge to our continually evolving industry.

#### About CreativeOne

CreativeOne is an industry-leading insurance, securities, and wealth management organization that exists to enrich the lives of financial professionals by creating meaningful, personal relationships built on proven industry expertise, superior service, and strategic solutions. CreativeOne aspires to be the one partner financial professionals rely on to build their practices and deliver on their clients' goals. For more information, visit [www.creativeone.com](http://www.creativeone.com) or call 913.814.0510.

#### About CreativeOne Securities

Founded over a decade ago, CreativeOne Securities is an independent hybrid broker-dealer focused on providing flexibility and a wide array of services to registered representatives and advisors who operate their practice with the highest integrity. Representatives have unfettered access to a core team who average more than 20 years of field and/or broker-dealer management experience alongside advisory tools and relationships to help maximize opportunities for their business and clients. The relationship-driven service and open-door policy to leadership are unmatched. Those are two of the reasons 98% of representatives continue to choose CreativeOne Securities and call it their forever independent brokerage. For more information visit: [www.creativeonesecurities.com](http://www.creativeonesecurities.com) or call 888.909.9399.

Member FINRA/SIPC and an Investment Advisor.

#### About CreativeOne Wealth

We deliver technology-driven wealth management tools alongside high-touch consultation to create firm efficiencies for independent investment adviser representatives, subadvisers, and solicitors. CreativeOne Wealth's vertically integrated wealth management services coupled with industry-leading marketing help entrepreneurial wealth managers navigate increasingly dynamic and complex needs. CreativeOne Wealth is an SEC-Registered Investment Advisory firm that delivers an adviser-centric experience, empowering financial firms across the U.S. For more information, visit:

[www.creativeonewealth.com](http://www.creativeonewealth.com) or call 888.798.2360. Advisory Services are offered through CreativeOne Wealth, LLC an Investment Adviser.

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Perry Boles

CreativeOne

+1 800-992-2642

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