



IBD/RIA FACT SHEET



B/D (or RIA) name: United Planners Financial Services

Address: 7333 East Doubletree Ranch Road, Suite 120, Scottsdale, Arizona 85258

Phone: 800-966-8737

Business development contact: Sheila Cuffari-Agasi

Web link: JoinUnitedPlanners.com

Number of back-office employees: 50

Number of financial advisors: 335

Total client assets under management: 7.7 Billion

Advisors' average length of service (in industry): 20

Total revenue for the latest fiscal year: \$64,635,249.00

Total revenue from commissions: \$37,048,173.00

Total revenue from fees: \$18,157,727.00

Average AUM per rep: \$22,985,074

Average payout per rep (percent): 92%

Average production per rep: % 210,000.00

Number of Dually Registered Reps: 235

About the Company:

United Planners (UP) is a Registered Investment Advisor and full-service Independent Broker-Dealer uniquely structured as a Limited Partnership. Representatives enjoy association with a stellar organization and rave about the culture, flexibility and true independence they experience beginning day one. High payouts, profit sharing, technology, service, marketing support and RIA flexibility (including the support of Independent RIA's) are among some of the most favored features.

UP has established strategic relationships with open architecture service providers within the ERISA market giving our Advisors the capabilities and tools to manage and grow their practice while adhering to our high Fiduciary Standards.

Gather UP info by calling Partner Development at: 800-966-8737