



Nexus Strategy Reaches 10-Year Milestone

~ Leading wealth management consulting firm founded by industry veteran, Timothy D. Welsh, continues growth trajectory and dedication to working with organizations supporting independent financial advisor success

Larkspur, CA. April 11, 2016. Nexus Strategy, LLC, a leading consulting firm to the independent wealth management industry, announced today that it has successfully reached the ten year milestone, serving over 50 companies and organizations during that seminal time period.

Launched on April 11, 2006, Nexus Strategy has been a key consulting and thought partner to the leading firms that support financial advisor success. By helping organizations navigate the complex and fragmented independent advisor marketplace, Nexus Strategy has been an invaluable partner in the growth of many of the top organizations serving advisors.

“The growth of the independent advisor market place has created a tremendous opportunity for technology firms, investment product manufacturers, custodians and wealth management platforms to provide the key products, services and technology that has enabled the industry to thrive, said Timothy D. Welsh, CEO and founder of Nexus Strategy. “We are honored to be a part of that movement and a partner to these great organizations.”

Some of the highlights of Nexus Strategy’s contributions over the last 10 years include developing thought leadership content on the key trends, issues and future direction of wealth management that are relied upon on a daily basis by key decision makers as well as opinions and commentary for the industry trade press.

Additionally, Nexus Strategy has been the leading marketing strategy consulting firm for a number of industry-defining transactions, including the strategy, brand building and marketing support for:

- Portfolio management system Black Diamond Performance Reporting, which was acquired by SS&C Advent for \$72 million.
- Financial planning software maker Finance Logix, which was acquired by Envestnet for \$30 million.



- Rebalancing platform Total Rebalance Expert (TRX), which was acquired by Morningstar for an undisclosed amount.
- Robo advisor Jemstep, which was acquired by Invesco for an undisclosed amount.
- Investment manager Asset Dedication, which was acquired by BondDesk for an undisclosed amount.

“It is truly an honor and a privilege to be able to work with such visionary CEOs and entrepreneurs and contribute meaningfully to their success,” said Welsh. “We look forward to another 10 years of serving and participating in the continued growth of the independent wealth management movement.”

About Nexus Strategy, LLC and Timothy D. Welsh, CFP®

Nexus Strategy is an innovative consulting firm that provides strategic marketing advice and guidance to the wealth management industry. Nexus Strategy provides end-to-end, comprehensive consulting services, advice and content development for technology companies, wealth management platforms, investment product suppliers, and financial institutions focused on the independent advisor marketplace.

Timothy D. Welsh, CFP® is CEO and founder of Nexus Strategy, LLC. Prior to founding Nexus Strategy, Mr. Welsh was Director of Business Consulting Services for Schwab Advisor Services where he led the development and marketing of practice management resources for independent RIAs.

Prior to joining Schwab, Mr. Welsh was vice president at Merrill Lynch where he was responsible for marketing, product development and financial advisor training for the financial planning group. Mr. Welsh is the author of a number of industry white papers and articles and is a frequent speaker at industry conferences and events. He has also served as a past national director of the Financial Planning Association.

To learn more, log onto www.nexus-strategy.com or follow @NexusStrategy on Twitter.