

Transitioned 90%
of AUM in 40
business days

Joined Janney
from UBS in 2025

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The transition has been so much easier than we could have imagined. Our clients are happy, we're happy, and the whole process has left us thinking, 'This is how simple it should be to do business.'

Danny and Jim Clark, Short Hills, NJ
SVP/Wealth Management, Financial Advisors



An effective transition built around you

On average, Janney advisors
successfully transition over 94%
of their target clients.*

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