

Client Focus and Experience Fuel Explosive Growth for Independent Financial Advisors

Gladstone Wealth Group



The Gladstone Wealth Group Team

Investor demand for bias-free advice and more stringent consumer protection rules are transforming the financial services industry. Gladstone Wealth Group in Bedminster, New Jersey, is already proving that the much-needed move toward truly independent advisors can be a win-win for investors and advisors alike.

“From our independence, clients gain access to a universe of investment opportunities. And that’s what every true advisor needs for their clients.”

Unencumbered by sales quotas and stockholder expectations, Gladstone is experiencing explosive growth, increasing assets and revenues, and expanding its breadth of services. It grew from two advisors to a group of 12 in just one year. Two more advisors will be joining soon, and Robert Hudson, president and founder of the group, projects 30 percent annual growth will continue for the next 20-plus years.

“We’ve had quite a bit of organic growth as existing clients build wealth and transfer more of their assets here over time. We’re also growing because our group is attracting top producers who realize independence can be a better option. We typically provide payouts that double what large wirehouses and banks do, and we provide world-class support from the largest independent broker-dealer* in the nation. Advisors can focus on providing better service to clients instead of constantly prospecting,” says Hudson, who himself left behind a 10-year stint with some of the giants in the financial services industry to open the LPL-associated group.

Gladstone’s recruiting strategy has resulted in a “Dream Team” of professionals, each with special areas of expertise to address clients’ entire financial lives. Taking a “multifamily office” approach, the practice is a single point of contact for a wide range of services, usually at no additional cost to the client.



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*As reported in *Financial Planner* magazine, June 1996-2014, based on total revenue.

“Under one roof we have Certified Financial Planner™ Professionals, insurance advisors, specialists in group health benefits, as well as estate planning and CPA Professionals. We have excellent relationships with banks and can help direct our clients where to obtain the best rates on loans and FDIC-insured deposits,” says Hudson. “Clients really appreciate the simplicity. When all these professionals are on the same page, the result is a well-coordinated financial game plan.”

Unbiased Advisors Champion Investors’ Interests

For investors, working with an independent advisor is critical. Rather than being locked into a few proprietary investment products, independent advisors can give clients access to the entire universe of opportunities and can customize strategies that are unique to each individual.



Robert Hudson, President, and Keith Brothers, SVP

“Independence allows us the ultimate luxury – putting clients’ interests ahead of our own or that of the broker-dealer,” says Keith Brothers, SVP. “If a client has a problem we can’t solve, we have the flexibility to find an answer for them. We’ll do whatever it takes, even if it means forming new partnerships to meet those needs.”