Invite PFI Advisors to Speak at Your Event

About PFI Advisors

PFI Advisors, LLC ("Pure Financial Independence") was founded in 2015 with the following mission in mind:

To further evolve the RIA industry from a collection of "practices" to "businesses," and to be a continued voice in validating the industry as a legitimate landing spot for billion-dollar teams and their clients."

PFI Advisors is pioneering an operational consulting service that supports the back-office, technology, and operational needs of RIAs in growth mode. PFI Advisors conducts Technology Assessments, manages Technology Conversions, and provides M&A Preparation and Integration Services.

For breakaway advisors, PFI Advisors manages full RIA set up and transition to Independence, including office build-out, RIA infrastructure, client transition, and bill services for a simple, one-time consulting fee. There is no complicated long-term AUM fee structure or equity stake required to build the firm's future and provide advisors ***Pure Financial Independence***.

About Matt Sonnen, Founder & CEO

Matt Sonnen learned the ins and outs of the wirehouse model at Merrill Lynch in the late 1990s prior to founding PFI Advisors. After leaving Mother Merrill in 2005, he was introduced to the RIA marketplace a few years later when he helped build the infrastructure for Luminous Capital prior to its founding in 2008. As COO and CCO at Luminous, he navigated the technology and compliance challenges as the firm grew from $1.7 billion in assets to nearly $6 billion in less than five years.

Luminous Capital sold to First Republic Bank for more than $100 million in 2012, after which Matt headed to Focus Financial Partners in New York City. There, he helped breakaway teams and recently-formed RIAs develop strategic initiatives to benefit from best practices, streamline operations, and improve efficiencies before heading back to California to launch PFI Advisors with his wife and business partner, Larissa Marcontell Sonnen.

To check Matt's availability for an upcoming conference or event you are hosting, please contact PFI Advisors at info@pfiadvisors.com or (424) 336-9250.

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Matt has previously spoken for the following sponsors/industry conferences:

- Schwab IMPACT
- Pershing Symposium
- Fidelity Operations Steering Committee
- Envestnet's Advisor Summit
- National Practice Management Groups
- Family Wealth Report
- CFA Society
- UCLA

Matt is available to speak about the following topics:

Specific Topics

- Best Practices for Operational Efficiencies
- How Top Firms and Practices Will Grow into the Future
- The Value Professional Management/COOs Can Bring to an RIA
- Streamlining Operations and Client Service Across Multiple Offices
- How to Best Make Your Firm Attractive to a Tuck-In/Merger Candidate
- Vendor Due Diligence in the RIA Space
- Alternative Strategies for Client Portfolios
- Prospecting and Serving Ultra High Net Worth Clients
- Chief Compliance Officer Strategies for Gaining Partner Buy-In
- How to Prepare for and Survive an SEC Audit

Industry Topics

- Breakaway Advisors/RIA Set Up
- Operations and Technology for RIAs
- M&A Operational Preparations
- M&A Integration Support
- Top Skills Needed for Chief Operating Officers and/or Chief Compliance Officers
- Hiring Practices/How to Attract Talent to Your RIA

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