

What to Expect During an Advisor Transition

The truth is: Switching advisors is easier than you think...*when you choose the right partner.*



Deciding to work with a new advisor is a big step. The transition itself doesn't have to feel like one. With Plancorp, you'll find that moving your accounts is simpler and smoother than most people expect.



Discovery & Fit

It starts with a conversation. You share your goals and questions; we share our approach. If it feels like a fit, we move forward together.



Agreement

We'll share a straightforward client agreement for your review. Once you're ready to sign, we'll be ready to dive in. You're officially a Plancorp client!



A Seamless Transition

Here's the part most people worry about—but don't need to. We'll kick off account transfer requests on your behalf as well as start to draft deeper plans that we'll review with you during onboarding.

Almost everything happens without you lifting a finger. You'll always know where things stand. And before long, your accounts are managed under the Plancorp umbrella, *fully aligned to your goals.*

You don't need to 'break up' with your current advisor. Once you sign the transfer paperwork, the process runs quietly behind the scenes through an automated account transfer system. Your current advisor can't block it, and we'll keep you posted along the way.

The Bottom Line

Switching advisors is more common and often easier than people think. With the right partner guiding the process, it's a smooth, stress-free step toward the financial future you want.