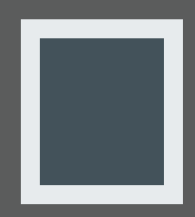
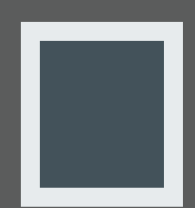
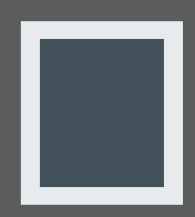


How to **Retain Advisors** in a Competitive Market



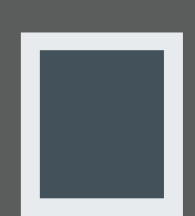
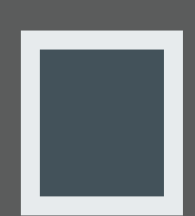
Understand Why Advisors Leave

34% of employee advisors and 41% of independent advisors say they may not stay with their current firm in the next one to two years.



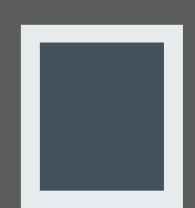
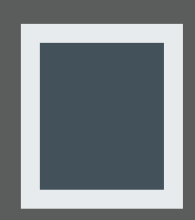
Address Key Pain Points

Approximately 50% of advisors who intended to leave their firm actually did within two years.



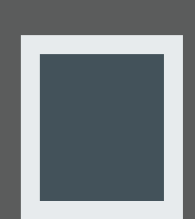
Use Technology to Build Loyalty

Significant gains in advisor satisfaction were linked to improved technology and operational support.



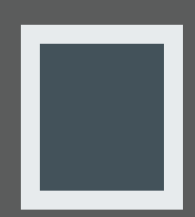
Prioritize Leadership and Culture

Advisors who feel confident in firm leadership are far more likely to remain loyal.



Create a Retention Strategy

Satisfaction among employee advisors rose 49 points year-over-year when compensation, technology and support were improved.



Empower Your Advisors with Docupace.
Learn how modern technology can improve retention and drive loyalty.

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Sources for Stats

J.D. Power: "2024 U.S. Financial Advisor Satisfaction Study" ([jdpower.com](https://www.jdpower.com))