

WAGN Hub Case Study: Naviter Wealth



Naviter Wealth, a newly established RIA, created by a team leaving an investment bank, needed transition and ongoing services to streamline operational efficiencies, offer exclusive opportunities to UHNW clients, and spend more time with clients.



Issues

- As a new RIA, lacked support from previous financial services firm
- Needed help during the transition setting up compliance, custodian, marketing, office space, technology, legal, etc.
- Needed assistance with navigating the legalities of leaving their previous firm
- Post transition: growth of the firm and opportunities to offer UHNW clients exclusive investment strategies



Results

- Naviter self funded the transition, while WAGN managed every aspect of the break
- WAGN hub partners provide back-office support – allowing Naviter to **streamline operational efficiencies & spend time on what matters: their clients**
- **Exclusive access to private client insurance** allows Naviter to provide white glove insurance at a highly competitive rate
- Access to alternative investment solutions allows Naviter to **offer alts to children of current clients, who don't meet typical minimums** – strengthening multi-generational relationships
- In less than 2 years, crossed **\$650M in AUM**

