

# Consulting Case Study: Breakaway Support



Octavia, a group of 12 advisors, wanted to leave their large insurance group and branch off independently but was faced with a complex transaction.



## Issues

- Breakaway transaction was complex due to volume of accounts
- Group unclear as to staffing/roles needed at independent firm
- Multi-location technology infrastructure required
- Needed access to open architecture insurance BGA



## Results

- Recruited and hired Director of Operations and created organizational structure
- Multi-location platform built to provide foundation for future recruiting
- Located and negotiated insurance platform replacement
- In <2 years, firm has **14+ partners and \$1B+ in AUM**