

United Planners Celebrates Success!



SCOTTSDALE, AZ / OCT 26, 2023 / PRNewswire: At the [United Planners 2023 Connect National Conference](#), there were many accomplishments to celebrate: winning Top Workplaces award, ranking in the top 10 of wealth management firms across the country in multiple categories by Financial-Planning.com, and its financial advisors for their dedication to their clients while charitably giving back to the community. United Planners is proud of its Arizona heritage as it was established in AZ in 1987 and remains headquartered in Scottsdale, AZ. [United Planners](#) continues to be 100% privately owned and operated by its home office employees (who are based in Scottsdale) and financial advisors (who are based across the country). [The home office team provides back-office support to its financial advisors, who provide valuable wealth management services to the general investing public.](#) "We have a huge responsibility to help the everyday investor manage their wealth, which can span across a wide range of financial goals and objectives, such as retirement planning, financial planning, college planning, investment management, employer retirement plans, or insurance services," says [Billy Oliverio](#), Executive Vice President-Chief Marketing Officer.

Story from 

Wealth management firm puts clients' needs first

Wealth management firm has unique ownership model, client-centric focus

Michelle Martin, for United Planners Financial Services

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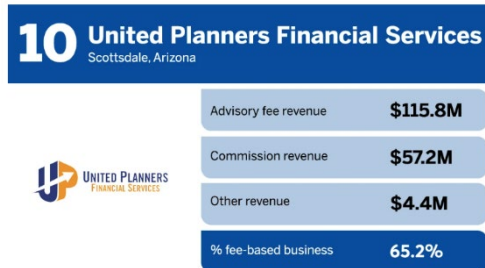
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United Planners Financial Services has been named a Top Workplace in Phoenix, Arizona. Photo Provided By United Planners Financial Services

United Planners recently participated in the [Top Workplaces](#) process (powered by [Energage](#)) for the first time to get a sense of how they ranked as an employer. Low and behold, [United Planners received top honors](#) from its employees resulting in the company getting ranked in the top 20 in the Small Business Category. AZ Central published an article about the wealth management firm's [unique ownership model that is client-centric focused, and still takes the time to be charitable to give back to the community.](#) "We're very proud of this top tier ranking especially considering it was our first time participating in this event," said [Mike Baker](#), President/CEO. Baker continued to say, "This independent recognition validates our employee-friendly company culture that offers many benefits and flexibility." United Planners embraces a hybrid work environment, dogs in the office, and frequent employee appreciation events. "We recently took our entire home office team to Jackson Hole, Wyoming for an amazing and unique experience to show our appreciation for all their hard work in supporting our advisors and strategic partners," said Baker. This is exactly the kind of stuff that earned [United Planners the Top Workplace award.](#)

From an industry rankings perspective, Financial-Planning.com’s [“Annual Independent Broker Dealer \(IBD\) Elite 2022” rankings for which independent brokerages have the Biggest Registered Investment Advisors?](#) ranked United



10. United Planners Financial Services

Total 2021 revenue: \$177.4 million
Revenue change, compared to 2020: 28%
2021 advisory fee revenue: \$115.8 million
Advisory fee revenue change, compared to 2020: 31%
Overall IBD Elite ranking: #23

Planners #10 with 65% of its \$177 million total revenue derived from advisory fee revenue. In another Financial-Planning.com ranking for [“Annual Independent Broker Dealer Elite 2022 for firms with the most female financial advisors,”](#) United Planners ranked #7, which is mission critical to prepare for the roughly \$80 trillion generational wealth management transfer that is well underway. [“Recruiting younger advisors and female advisors](#) is extremely important as thousands of aging advisors are exiting the business and it is imperative we help them with their [succession planning and business continuity processes](#). Preparing future generations starts with aiding the aging population with their exit strategies, and at United Planners, we assist with all aspects of this planning process,” said [Sheila Agasi](#), Executive Vice President-Chief Revenue Officer.

[United Planners’ overall ranking was #23 out of 47 Independent Broker Dealer participants in Financial-Planning’s](#)

[“IBD Elite” survey.](#) “Our ranking is a fantastic accomplishment given our size and it perfectly demonstrates that you don't have to be the biggest to be one of the best,” said [Chad Shindel](#), Executive Vice President-Chief Financial Officer. Chad continued to say, “Diligently managing the firm's financials is core to our foundational strength and stability, which further supports our future growth plans while simultaneously providing our financial advisors and investors with that all important piece of mind.”



7. United Planners Financial Services

Chief executive: Michael Baker
Year founded: 1987
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About United Planners

United Planners is a national wealth management firm that provides financial planning, investment management, and insurance services. Established in 1987, United Planners is proud of its true independence and its **“Adamantly Not For Sale”** stance because it is 100% owned by its employees and financial professionals. United Planners provides back-office support to independent financial professionals, who help investors manage their wealth to achieve their financial goals & objectives. United Planners is uniquely structured as a limited partnership that offers ownership opportunities and profit sharing to its employees and financial professionals. We embrace a culture, passion, and strategy that caters to the fiercely independent financial services community. United Planners is an open-architecture model that offers flexible, efficient, and scalable solutions to position its financial professionals to build and manage successful businesses. Learn more about United Planners at www.UnitedPlanners.com or 800-966-8737, Option 3. United Planners is a Registered Investment Advisor with the Securities & Exchange Commission (SEC) / Registered Broker-Dealer with the Financial Industry Regulatory Authority (FINRA) / SIPC Member.

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