

Triad Welcomes a California Team with \$225 Million in AUM

<https://thediwire.com/triad-welcomes-a-california-team-with-225-million-in-aum/>

May 27, 2015



Independent broker-dealer (IBD) Triad Advisors, Inc. (Triad) recently welcomed Summit Financial Consultants (Summit) to its broker-dealer and hybrid RIA multi-custodial platform. The California-based independent advisory firm manages about \$225 million in high-net-worth client assets.

“We are delighted to welcome Summit Financial Consultants to Triad Advisors and we look forward to helping Summit grow its wealth management business through an expanded menu of resources and solutions,” said Nathan Stibbs, Executive Vice President, Business Development at Triad Advisors.

Neil Elmouchi, President of Summit Financial Consultants, commented, “Everything we do at Summit revolves around the quality of the client experience we deliver, and affiliating with Triad afforded us a palette of resources that was previously unavailable to us.”



Founded by Elmouchi in 1985, Summit has provided clients with investment management, insurance, and retirement planning, in addition to working alongside outside counsel delivering comprehensive financial planning and wealth management solutions.

Summit's team includes four financial advisors and ten support professionals. As such, the company only takes on a limited number of new clients each year in order to maintain a high level of service for existing clientele.

Stibbs added, "Like Triad, Summit is extremely entrepreneurial and its focus on providing an indispensable client experience will make Summit an excellent addition to the Triad family."

"We are very happy to affiliate with a firm like Triad that combines foresight and the human touch - qualities so important to our own value proposition - with flexibility and a depth of professional capabilities," said Elmouchi.

Triad is a wholly owned subsidiary of Ladenburg Thalmann Financial Services Inc. (Ladenburg).

Elmouchi looks forward to exploring "additional advisory and transactional capabilities" available as a result of Triad's relationship with its parent Ladenburg.

