



Continuity Partners and Gould Asset Management Announce Groundbreaking Succession Agreement

Unique alliance sets a new stage for independent RIAs seeking customized strategies for succession planning, acquisition, and organic business growth

FAIRFIELD, IA, Feb. 12, 2015 -- Continuity Partners Group, LLC, (Continuity Partners) today announced a formal agreement with Gould Asset Management LLC (Gould), an independent registered investment adviser (RIA) based in Claremont, California. With nearly \$440 million in client assets, Gould provides innovative investment strategies designed to help its clients achieve their long-term financial goals. This new agreement will support Gould's development of customized strategies for succession planning, acquisition, and organic growth. With this agreement, Gould becomes the first independent RIA member of Continuity Partners, joining 168 other advisor-members with the independent broker-dealer, Cambridge Investment Research, Inc. Details of the agreement were not disclosed.

"Independent RIA firms are facing real challenges as they consider how best to plan for succession along with strategies for acquisition and organic growth," said Eric Schwartz, founder of Continuity Partners. "In 2010, Continuity Partners introduced a unique and visionary approach to succession planning and staged retirement for independent financial advisors. We are finding this approach to be relevant to owners of successful and growing RIAs that seek economies of scale while continuing to own and run their RIA business."

"The best succession plans are well defined agreements that reflect the unique underlying business model and service approach of the independent advisory firm," said Schwartz. "A truly customized approach that contributes to long-term success is very appealing to independent RIA firms, as the founders of the firm seek the best means to bring in the next generation of leaders." Schwartz added that while each agreement is unique, the result is a collaborative working partnership enabling the independent RIA owner to continue to own and run their business.

Don Gould founded Gould Asset Management in 1999 after a distinguished career with Franklin Templeton and Huntington Funds. In that time, Gould Asset Management has become one of the leading RIAs in the Los Angeles area, serving 250 clients throughout California and the U.S. with a team of nine full-time staff that includes five portfolio management professionals.

"After considerable research, we concluded that an agreement with Continuity Partners would provide the ideal combination of benefits—continued independence to manage our business in the best interests of our clients and staff, with the flexibility to support our long-term succession planning and potential acquisition need," said Don Gould, founder and president of Gould Asset Management. "We are particularly attracted to the mutual

structure of Continuity Partners, which is owned by and operated for the benefit of its member advisory firms,” said Gould.

Continuity Partners is a special purpose broker-dealer and investment adviser within the Cambridge Investment Group family, which includes one of the largest privately owned independent broker-dealers – Cambridge Investment Research, Inc. (Cambridge). Eric Schwartz founded Cambridge in the 1980’s and has dedicated more than 30 years to supporting the independent ownership and objective advice model for independent financial professionals. Schwartz began his focus on the challenges related to succession planning in 2007, resulting in his formation of Continuity Partners. Initially intended to specifically address succession planning for independent advisors with Cambridge, Continuity Partners also supports independent RIA firms in their development of effective long-term succession plans and strategies for continued business growth.

“We are excited about welcoming Gould Asset Management as a member of Continuity Partners,” said Jeff Vivacqua, Senior Vice President of Marketing for Continuity Partners. “Gould exhibits the kind of values and forward thinking business strategies that should be beneficial for years in its association with Continuity Partners,” said Vivacqua.

About Continuity Partners Group

Continuity Partners Group is a special purpose broker-dealer and investment adviser within the Cambridge Investment Group family. Continuity Partners brings a unique and visionary approach to succession planning and staged retirement for independent financial advisors. This approach is also relevant to owners of successful and growing RIAs that seek economies of scale while continuing to own and run their RIA business. Nearly 170 advisor-members are with Continuity Partners. www.continuitypartners.com

About Cambridge

Cambridge Investment Research, Inc. (Cambridge), member FINRA/SIPC, is among the largest independent, privately owned broker-dealers in the U.S. with more than 2,500 independent registered representatives and over \$65 billion assets under management. www.joincambridge.com

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Securities offered through Cambridge Investment Research, Inc., a broker-dealer, member FINRA/SIPC, and investment advisory services offered through Cambridge Investment Research Advisors, Inc., a Registered Investment Adviser. Both are wholly-owned subsidiaries of Cambridge Investment Group, Inc. Continuity Partners Group, LLC is a Broker/Dealer, Member FINRA/SIPC and registered investment advisor. Continuity Partners Group, LLC is a wholly owned subsidiary of Cambridge Investment Group, Inc. Gould Asset Management LLC, a registered investment advisor, is not affiliated with Cambridge Investment Group, Inc. or any of its wholly owned subsidiaries.

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