



Growth and rebirth

The right partner can make a business unstoppable

OLEY KINSER CONCIERGE WEALTH



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EXECUTIVE SUMMARY

To Brett Oley and Ryan Kinser, freedom means more than the ability to run their business as they see fit. It also means having the support of their firm when they need it, wherever they need it, to remove roadblocks, overcome unexpected challenges and provide the best possible service to their clients.

As the owners of Oley Kinser Concierge Wealth, they have experienced firsthand what independence at Raymond James truly means. In partnering with a firm that both respects the autonomy of their business and is the first to lend a hand when help is needed, they have achieved inspiring success and grown their business in the face of adversity – building new relationships and strengthening bonds in their community.

CASE STUDY

The opportunities of autonomy

Since founding Oley Kinser Concierge Wealth, Brett and Ryan have built their business and expanded their reach, working closely with Raymond James to turn potential setbacks into opportunity following Hurricane Ian in 2022.

A CHANCE ENCOUNTER

The genesis of Brett and Ryan's friendship and eventual business relationship goes back to when they met through an MBA program at the University of Florida (UF). They were each given the option to travel to Gainesville, where the UF campus is located, or study abroad to take their elective courses. Being the naturally adventurous type, both elected to travel to Dubai, where they met the first time – even though they were in different cohorts.

Before long, they had become close friends and set forth on their career journeys as financial advisors, each settling in with a large broker/dealer with a branch office in Naples, Florida, where they would spend a number of years before deciding to make the leap to Raymond James.

FINDING THEIR NICHE

In the real estate world, age-old wisdom states that location is everything. For Brett and Ryan, the same applies to their business in financial services. In addition to serving retirees, business owners, corporate executives and families in 26 states, they have found that their home state of Florida, more specifically Collier and Sarasota counties, presents a particularly advantageous set of opportunities.

After joining Raymond James, the support for their specialization as a business resulted in the team writing and publishing two books, the latest being "Sunshine State Strategy: Your Essential Guide to Becoming a Florida Resident." Independence has also empowered them to offer a special program for individuals and couples on the educational process of becoming Florida residents, and how doing so can present exciting possibilities in a long-term financial plan.

MAKING THE SWITCH

Brett and Ryan break down the most important aspects of their work into three categories: working with clients, keeping up with the market and owning a business. Ryan expresses how those three aspects of their work make the job so special.

"We are fortunate to be working with a client base we really enjoy," says Ryan. "Each one has an interesting story. No two days in the market are ever the same and navigating clients through choppy waters is where we believe we can really add value.

Oley Kinser Concierge Wealth



Joined Raymond James

Brett: October 2017
Ryan: May 2018



Location Naples, Florida



Business model Primarily fee-based



AUM Over \$500 million,* representing mostly self-made clients across 26 states

*As of 8/31/2023

Finally, being a business owner and having that organic growth that comes with it are exciting.”

Brett adds, “Being a business owner is a dynamic that you can’t understand until you’ve done it. It’s a different feeling. This is your baby that you’ve created and you care about it more.”

But this level of freedom – to hand-select every client, monitor the markets with advanced, advisor-centric technology and do so while having full ownership of their business – it wasn’t possible before joining Raymond James.

The move started with Brett having conversations with Raymond James home office personnel. “I was hearing a lot of good things from a lot of people,” he says. “I did a Home Office Visit and got an impression that was different.” It wasn’t long before Brett experienced firsthand the culture that Raymond James holds in such high regard. “That day I had lunch with Private Client Group President Scott Curtis, even though at the time I wasn’t a huge producer. I could tell that they meant it when they said we could go anywhere if we changed our minds later. They make it clear that they want you, and they prove it by doing everything they can to make you want to stay.”

NOTHING TO FEAR

By Day One, Brett and Ryan knew they had made the right choice joining Raymond James. “We wanted to make the move as quickly as we could for the sake of our families’ stability,” says Ryan.

“If your firm isn’t giving you what you need to do right by your clients,” says Brett, “then it’s riskier not to transition. Transitioning can feel like climbing a mountain leading up to it, but understand that your clients are there for you and not your firm, and that they will follow you. Raymond James does so much of the heavy lifting that you can focus your time and energy on your clients to make them feel as comfortable as possible.”

After spending so much time building relationships at their former firm, the success of Brett and Ryan’s transitions to Raymond James was natural. “We brought over 99% of our clients,” says Brett. “At the end of the day, they’re doing business with their advisor, not a name on the door.”

In addition to the relief that came with retaining nearly all of their clients, Brett and Ryan appreciated Raymond James providing the transition support team needed to establish their new, independent business, a team that supported their entrepreneurial spirit and enabled them to control their own destiny.

Oley Kinser Concierge Wealth has gone from around \$125 million AUM to over \$500 million* since joining Raymond James, something that they have achieved by aligning their personal values of putting clients first with a firm that believes in the same.

*As of 8/31/2023

HOME SWEET HOME

Since settling in, Brett and Ryan have experienced the full benefits of affiliating with Raymond James and the freedom that comes with running their own business. “Raymond James treats us like their clients so that we can turn around and take care of ours,” says Brett. “The reputation here is success through running a good, clean business.”

They have especially enjoyed tools such as Client Access and evolving products that keep up with a changing industry. “In terms of technology, there really is nothing quite like AdvisorMobile,” says Ryan. “It’s easy to do business when we can access client info and answer questions from anywhere. I’m always impressed with constant improvement to the tech infrastructure, and if there’s a quality third-party provider out there such as DocuSign, Raymond James will use them instead of reinventing the wheel at the expense of functionality and advisors’ time.”

“The CRM is very good, and we use it routinely,” says Brett. “For prospecting it’s fantastic. A lot of this business is about communication and staying in front of people. The back office always answers the phone and they are very knowledgeable. It’s a smooth operating system.”

When it comes to receiving service from the back office, the team at Oley Kinser Concierge Wealth has noticed a stark contrast compared to other firms. “We say that all the sunshine has people in a better mood,” jokes Ryan. “The people are here to help and the positivity of people we interact with is felt. You get efficient answers from friendly phone calls. It’s really an uplifting culture at Raymond James.”

DEDICATION WHERE IT REALLY COUNTS

Oley Kinser Concierge Wealth and their local community in Naples, Florida, faced unprecedented personal loss resulting

from Hurricane Ian in 2022. “Throughout the past several years here, we have been through a lot, from recessions to bank failures, and Raymond James has had our back through all of it,” says Brett. “But what really stood out were their actions in the aftermath of the hurricane.”

Raymond James contributed to relief efforts for those affected by the hurricane, beginning long before it ever made landfall, by preparing people in the storm’s path. Once it had passed, all available resources were directed toward those associates, advisors and communities impacted by the disaster. “They made sure that we had space to work,” says Brett. “The work they put in to keep us connected with our clients and able to continue helping them through that time was amazing.”

“It’s just as much a hobby as it is a career.”

– RYAN KINSER

“This is more than just work to us. This is a fulfilling call of duty and our craft.”

– BRETT OLEY

Since then, they have been operating from a temporary location in Bonita Springs, Florida, where they were able to acquire a practice with the help of the Raymond James succession and acquisitions team to both expand their business and keep their existing one going.

Brett and Ryan are now on the verge of reopening their practice in Naples with a new building that is more than double the space of the previous one. “Our old office was 1,600 square feet,” says Ryan. “Our new one is 3,600 square feet, with plenty of room for us, our recently acquired practice and the second practice we are set to acquire soon.”

A powerful partnership

Since partnering with Raymond James, the practice has:



Successfully transitioned 95% of existing clients



Maintained a strong team



Strengthened client-first service and tech capabilities

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