MORVIX

www.wearemorvix.com

FINANCIAL ADVISOR RECRUITING • APPOINTMENT SETTING

Conversations With Advisors Who Are Open to a Better Home for Their Practice

For recruiting firms, broker-dealers, RIAs and agencies that need qualified advisor conversations, not more names on a list.

5
ENGLISH-SPEAKING MARKETS

QA
ON EVERY BOOKED LEAD

1
CLIENT PER TARGET AREA

0
LEADS RESOLD TO COMPETITORS

TARGET MARKETS: UNITED STATES • UNITED KINGDOM • CANADA • AUSTRALIA • NEW ZEALAND

THE MORVIX DIFFERENCE

Advisors Don't Answer Recruiters. They Answer Relevant Conversations.

We approach licensed advisors with respect for their book, their clients and their time, find out who is genuinely open to a move, and book the conversation.

1

ADVISOR-AWARE CALLERS

Understand practice models, affiliations and what drives a move: payout, platform, support, independence and technology.

2

RESPECTFUL, NOT PUSHY

Advisors protect their clients and reputation. We lead with curiosity, not pressure.

3

RIGHT-FIT ONLY

Filtered by license, practice type and openness, so your recruiters talk to real prospects.

MORVIX

We Know the Recruiting Challenge

Gatekeepers and busy schedules

Advisors are client-facing all day and hard to reach directly.

Recruiter fatigue

Phones and inboxes flooded with generic recruiting pitches.

Happy where they are

Many advisors are not looking. Finding the ones who might is the real work.

Long, trust-heavy decisions

A move affects clients, income and reputation.

Wrong-fit conversations

Calls with advisors whose model, size or licenses don't match your platform.

Expensive lead sources

Paying for lists that are stale, shared or unverified.

MORVIX

The Morvix Engine Behind Your Campaign

01 Campaign Managers

Dedicated managers own strategy, coaching and daily performance of your advisor recruiting campaign.

02 Trained Callers

Tele sales experts briefed on advisor recruiting: its buyers, its language and its objections.

03 Own Dialer & Data

Proprietary dialer and data. No rented lists and no recycled leads.

04 R&D Team

A research team keeps target data accurate, fresh and matched to your ideal customer.

05 QA Team

Every booked appointment is reviewed before it reaches you.

06 Confirmation Team

Meetings are reconfirmed ahead of time, and you are told about any change.

THE PEOPLE BEHIND MORVIX

Real People. Real Industry Knowledge. Real Accountability.

The founders and partners who build, lead and stand behind every Morvix campaign.







OUR METHOD

MORVIX

From First Research to a Confirmed Meeting

01 Target Profile

License types, practice model, book size and geography.

02 Data & Research

Advisor data verified and maintained by our R&D team.

03 Respectful Outreach

A conversation-led approach with no scripted pressure.

04 Discovery

Current affiliation, satisfaction and what is missing.

05 Qualify

Licensing, practice size, openness to change and timeline.

06 Position the Call

A no-pressure intro about options, not a hard pitch.

07 Book the Call

Straight into your recruiter's calendar.

08 QA & Confirm

Reviewed, then reconfirmed before the day.

09 Handoff

Context and notes so your recruiter starts informed.

MORVIX

What Makes an Advisor Conversation Valid

A Valid Conversation Has

- Licensed, practicing advisor
- Practice profile matches your criteria
- Openness to exploring options
- Reasonable timeline to consider a move
- Booked with your recruiter

What We Uncover

- Current affiliation and practice model
- What they would change about their setup
- Approximate practice size
- Licenses and registrations held
- Timing and openness to a conversation

QUALITY & PROTECTION

MORVIX

Quality You Can Trust Before You Commit

01

QA Before Delivery

Every booked conversation is reviewed. Poor-fit advisors never reach your recruiters.

02

Confirmed Ahead of Time

Our team reconfirms before the call and updates you if anything changes.

03

Compliance-Aware Outreach

Calls are made with respect for applicable calling regulations and your guidelines.

04

Review & Decline

Check the details and tell us if the advisor is not the right fit for you.

OUR PROMISE

Loyalty Is Our Edge. And Yours.

Most lead generation and call center companies sell the same lead to multiple buyers.

You market to stand out and reduce your competition. Reselling your lead to others does the opposite: it manufactures competitors for you.

Disloyal partners multiply your competition and waste your time and budget.

While we work together, we stay loyal to you and do not onboard another client in your target area. That is how we stand out, and how you stand out from the crowd.

WHY MORVIX

MORVIX

Not Every Recruiting Partner Is Built the Same

	TYPICAL LEAD VENDOR	MORVIX
Lead ownership	Same lead sold to multiple buyers	**Exclusive to you in your target area**
Approach	Random calling and commonly used scripts	**Strategy-led conversations built on buyer psychology**
Who you meet	Gatekeepers and unqualified contacts	**Licensed advisors open to a real conversation**
Quality control	Everything gets sent, good or bad	**QA review before any lead reaches you**
Scheduling	Wrong areas, wrong times	**Booked into your calendar, reschedules handled**
No-shows	You find out on the day	**Confirmed ahead of time, with updates to you**
Loyalty	New competitors onboarded next door	**No new client onboarded in your target area while we work together**

REACH & CAPABILITIES

MORVIX

Advisor Recruiting Across Five Markets

BUILT FOR

- Broker-dealers
- RIAs & hybrid RIAs
- Insurance & annuity agencies
- Advisor recruiting firms
- Wealth management platforms
- Insurance marketing orgs

WHERE WE OPERATE

- United States
- United Kingdom
- Canada
- Australia
- New Zealand

ALSO SERVING

- Commercial Cleaning
- IT Services & SaaS
- Technology
- Real Estate
- Business Buying & Selling
- Digital Marketing
- Insurance
- Legal Services
- Medical & Healthcare
- Solar
- Roofing
- Property Preservation
- Customer Service Sales (VA)

Works inside your stack: HubSpot, Monday, RingCentral and more. Or on our own dialer and CRM workflow.

WORK WITH US

Let's Build Your Pipeline

RESEARCH | CALL | QUALIFY | BOOK | CONFIRM | DELIVER

1

Discovery Call

We learn your business, your ideal customer and your target area.

2

Campaign Design

Data, strategy and messaging are built around your market.

3

Launch & Deliver

Reviewed, confirmed appointments start landing on your calendar.

MORVIX

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WEBSITE

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Available for lead generation, appointment setting, outbound sales support and client hunting.