



JUST BECAUSE YOU'RE INDEPENDENT...
DOESN'T MEAN YOU'RE ALONE.



WE ARE BY YOUR SIDE **THROUGHOUT THE ENTIRE RACE**

CoreCap's mission is to provide independent financial professionals with industry-leading technology, personalized service and unparalleled value to enable an exceptional client experience and accelerate business growth by driving scale and efficiency.

CORECAP'S VALUE PROPOSITION

Industry-Leading Technology

Our single sign on solution through Amplify provides you with integrated technology for all of your client's service, portfolio management, client onboarding, third-party portfolio strategy and reporting needs.

Personalized Service

Your relationship manager is dedicated to providing you with accurate and timely solutions for your business so you can focus on the needs of your clients.

Unparalleled Value

Our operational support, compliance review and technology tools allow you to focus on exceeding your client's goals and objectives while maintaining your autonomy and competitive edge.





OUR CORE VALUES

TRUST, INTEGRITY & HONESTY

PEOPLE FIRST

ALWAYS INNOVATE

COMMITMENT TO EXCELLENCE

BE ALL IN

BIAS TOWARDS ACTION & RESULTS

OUR WIDE RANGE OF **PRODUCTS & SERVICES**

At CoreCap, you will gain independent advice and research on a vast array of products and services that will allow you to compete with the largest firms in the financial industry. CoreCap, through its relationship with M&O Marketing, maintains a full-service insurance desk offering annuities, long-term care, life insurance, disability income insurance, and 401 (k) options which allows you to meet your client's goals and objectives.

We are dedicated to bringing our advisors and their clients comprehensive financial planning strategies, investment advisory and brokerage services. Advisors also have access to marketing, creative and public relations services to help them grow their business.

OVER 270 THIRD PARTY STRATEGIES
STRUCTURED PRODUCTS
ALTERNATIVE INVESTMENT DESK
MODEL CREATION & MANAGEMENT
ADVISOR SUPPORT DESK
ASSIGNED RELATIONSHIP MANAGER
FIXED ANNUITIES
ATTORNEY COLLABORATIVE NETWORK
SUCCESSION PLANNING
MERGERS & ACQUISITIONS
ADVISOR RECRUITING





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CoreCap Investments is registered with the Securities and Exchange Commission ("SEC") as a broker-dealer and is a member of Financial Industry Regulatory Authority ("FINRA") and Securities Investor Protection Corporation ("SIPC"). CoreCap Investments offers brokerage services to retail investors, including buying and selling securities. CoreCap Investments primarily offers products such as mutual funds, variable insurance products, equities, bonds, and other options amongst other products. Currently, CoreCap Investments has a relationship with Royal Bank of Canada ("RBC") as the firm's clearing broker.

CoreCap Advisors is registered with the Securities and Exchange Commission ("SEC") as an investment advisor. CoreCap Advisors offers investment advisory services to retail investors, which includes portfolio and financial planning services. Portfolio investment decisions are made according to the investment objectives and risk tolerances of each client, and also the client's stated investment restrictions (if any) and special circumstances. As a relationship-oriented firm, CoreCap Advisors emphasizes individualized attention to a client's assets and investment needs. Investment decisions are made on a consultative basis with the client or the client's designated financial advisors, financial planners, attorneys or accountants. Currently, CoreCap Investments has a relationship with TD Ameritrade ("TD") as the firm's custodian.