



Commission-Free Insurance. Join the Revelation.

The Strategic Partner for RIAs

Commission-driven distribution of insurance has made annuity and life products untouchable for fiduciary advisors—until now. Founded in 2014, DPL Financial Partners has built a robust marketplace of Commission-Free annuities and insurance solutions for RIAs.

DPL works with carriers committed to the RIA market, improving their existing products and introducing new ones that deliver greater client value.

DPL enables advisors to strategically implement insurance and annuity solutions without compromising their fiduciary obligations. Our team provides ongoing advisor education, leveraging research from leading financial and retirement experts to help you use new solutions effectively.

To further empower advisors, DPL has developed a suite of tools and technology to help quickly identify the solutions that best fit your practice and clients' goals, all available at dplfp.com.



David Lau | DPL Founder, CEO

Established DPL in 2014
20 Carrier Partners
40 Products
10 Solution Types
1,500+ Member Firms

► Our Process for RIAs

1 Understand Your Goals & Foster Alignment

- Every firm is different, and as your strategic partner, DPL will consult with you to identify the goals for your business and develop a plan to help you achieve them. Our team will work with you to:
 - Build a repeatable income business model using Commission-Free solutions
 - Determine opportunities to improve client outcomes
 - Differentiate firm offering and capture additional assets

2 Leverage Technology to Identify & Model Solutions

- Our team will show you how to use tools to evaluate any current annuities and expand the solutions you currently provide your clients. By using this technology, you will be able to:
 - Efficiently compare legacy annuities to Commission-Free solutions
 - Improve fixed income allocations and efficiency
 - Identify products that deliver the most guaranteed income

3 Implement Your New Strategy & Ensure Success

- Once a plan is developed and opportunities are identified, our team will help you:
 - Transition accounts and increase client retention
 - Implement Commission-Free solutions in your practice
 - Provide ongoing education for new and exclusive DPL solutions

Smart Products with Meaningful Benefits

Fee-only advisors, breakaways and hybrids turn to DPL because we understand the RIA business and we know insurance. Our team curates the products on our platform to provide efficient, low-cost, Commission-Free insurance solutions that can deliver meaningful benefits to clients during the accumulation, transition and decumulation phases of their financial lifecycle.

The Power of Membership

When you join DPL, you're joining 1,500+ other firms who have seen the impact Commission-Free insurance and annuities can have on their practice and their clients' financial plans. Members enjoy full access to our product suite, discovery tools (right) and expert consultants to help address client insurance needs.

As an added benefit, the DPL's membership model creates a buying co-op to drive innovation and negotiate new products on behalf of fiduciary advisors. These products are exclusive to DPL Members, providing unparalleled client value and a significant advisor advantage in an increasingly competitive market.

DPL Membership Provides Access To:

- Team of licensed insurance experts dedicated to your success
- Robust suite of Commission-Free insurance products and exclusive solutions
- Tools and technology for identifying insurance solutions
- Exclusive thought leadership content

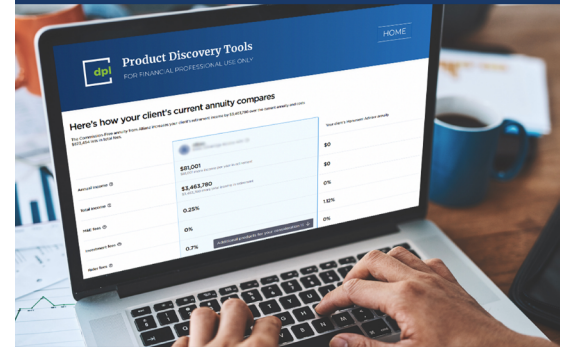
Innovation in Action

By working closely with our carrier partners, DPL is able to create new Commission-Free solutions exclusive to our members. Here are just a few examples:

- Fixed Index Annuities with an income benefit that increases payout through retirement and addresses long-term personal care
- The first-ever Registered Index Linked Variable Annuity for the advisory market with an income benefit

DPL TOOLS SUITE

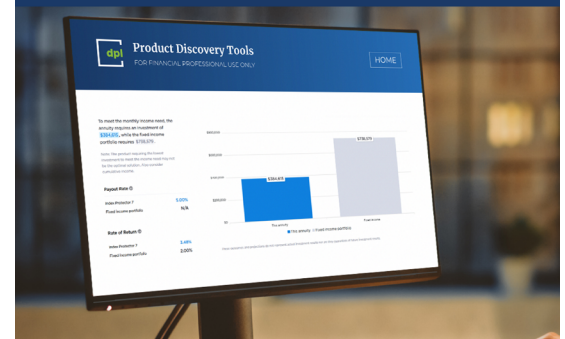
ANNUITY COMPARISON CALCULATOR



GUARANTEED INCOME ANALYSIS



FIXED INCOME COMPARISON



Our Carrier Partners



**Contact Nicole Benz
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get started.**

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