

TRICIA BRADY

executive, consultant, and best-selling author

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ABOUT ME

Tricia Brady is a seasoned executive, consultant, and author with over 30 years of experience in financial services. She has led operations, compliance, and M&A integration for RIAs from \$700 million to \$5 billion in AUM and has worked with leading aggregator networks including Focus, Dynasty, and HighTower.

As the author of *The Dance to Independence: The Advisor's Journey to Alignment, Freedom, & Ownership* and best-selling co-author of *Beyond the Broker*, Tricia equips financial advisors with the tools, strategies, and confidence to build independent firms that align with their values and vision.

Through her work as a strategic consultant, Tricia specializes in helping advisory firms future-proof their businesses with succession planning, service model design, and operational excellence. Her mission is simple: to help advisors not just grow, but grow with purpose.



DANCETOINDEPENDENCE.COM

Learn about Tricia's best-selling book, *The Dance to Independence*, and the collaborative book she was a part of, *Beyond the Broker*. Plus, you'll find extra resources and information on how to work with her.

TRICIA CAN ALSO BE FOUND ON



press & engagement

TALKING POINTS

- **The Journey to Independence** – Why more advisors are leaving wirehouses and aggregators, and the roadmap to building an independent firm aligned with values and vision.
- **Future-Proofing Advisory Firms** – Succession planning, scaling intentionally, and building infrastructure that lasts for generations.
- **The Human Side of Finance** – How empathy, leadership, and alignment with purpose create stronger firms, happier teams, and deeper client relationships.