

NEWS

For immediate release

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AZELLA and Gladstone Announce Strategic Partnership

Empowering independent financial advisors with brand essentials and digital marketing solutions drives expanded agreement for 2022

Kansas City, MO [1/25/2022] – [AZELLA](#) (Azella), a digital marketing platform and service solution for financial services firms and investment advisors, and [Gladstone Wealth Partners](#) (Gladstone), a financial services firm and SEC Registered Investment Advisor that supports financial advisors nationwide, today announced that the strategic partnership they began in 2021 will be expanded and enhanced in 2022.

Gladstone and Azella have been working together on internal and external marketing initiatives since Azella's founding in 2020. Through this expanded agreement, Gladstone – which is in super growth mode as they attract new clients and actively recruit financial advisors who want to experience new levels of success via a proven formula – will send a number of advisors to Azella for brand, marketing, and digital strategy through this strategic partnership. Gladstone-referred advisors will receive preferred pricing and preferred client status.

“Azella helps independent financial advisors quickly – and powerfully – brand and market their firms with innovative, effective design and hyper-relevant content so that they can easily connect with clients who need professional financial planning and investment management services,” said Azella CEO and Founder, David Roberson. “This enhanced strategic partnership will help Azella reach its ultimate goal of serving more than 10,000 advisors.”

Founded in July 2020, Azella works to solve a number of pain points experienced by financial advisors operating during the COVID-19 pandemic. Without access to traditional office space, advisors sought solutions for best communicating with clients. Azella automated communications and scheduling for advisors as they shifted to working remote.

“My vision and mission for the business is to help families and individuals with financial literacy, and I'm doing that through empowering advisors,” Roberson said. “We're creating a tool that streamlines an entire industry, and I'm excited to see the impact.”

Roberson is thrilled by the opportunity to work side-by-side with the Gladstone team to help independent advisors excel. "Gladstone and Azella agree that independent financial advisors make a big difference in the lives of their clients. Our affinity agreement is based on helping these firms do the most impactful work in the financial services industry. We are especially happy to become involved early on in the process as transitioning advisors and break-away teams consider their options in the independent financial advisor realm."

"It's been a pleasure working with David as he develops his team and begins to scale his product and offerings to better serve our advisors," said Kristopher Bonocore, President of Gladstone Wealth Partners. "Azella has done a wonderful job of supporting our organization by providing integral marketing and branding services to advisors in transition."

ABOUT AZELLA

Founded in 2020, AZELLA (Azella) uses modern marketing communication strategies to empower established or transitioning independent advisors with the tools they need to succeed. Harnessing over 10 years of experience in marketing, branding, and development in the financial advisory industry, the Azella team has perfected a proven process for driving awareness and growth. The Azella Advisor Method enables advisors to quickly establish credibility and grow their businesses utilizing today's innovative technology solutions coupled with Azella's professional business development insights and marketing advice. Azella's full-service SaaS marketing platform includes automated branding, dynamic website building, AI marketing and matchmaking for financial advisors. In 2022, the Technology Venture Studio at the UMKC Innovation Center announced that they had provided project-development funding to Azella due to their participation in Digital Sandbox KC, a proof-of-concept program that significantly and rapidly moves early stage entrepreneurs from concept to commercialization. Azella also in the recent past secured funding from the Fountain Innovation Fund, and venture capitalist / angel investor Vercie Lark, who previously was an executive vice president and head of DST Financial Services at DST Systems Inc. Learn more about Azella at www.Azella.io.

ABOUT GLADSTONE WEALTH PARTNERS

Founded in 2013, Gladstone Wealth Partners was created by advisors, for advisors in order to help them reach their maximum potential when going independent. Gladstone provides the necessary tools for advisors to have a complete independent business to include transition assistance, full-time compliance support, marketing assistance, human resources support, administrative assistance to name a few. Based in Chester, NJ, Gladstone Wealth Partners is a rapidly growing Registered Investment Advisor (RIA) with advisors nationwide. Gladstone helps advisors transition from running a practice to building a business, and ultimately receiving enterprise valuations. Learn more at www.WhyWouldYouStay.com.

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