

bank investment consultant

Insights and best practices for bank advisors

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bankinvestmentconsultant.com



THE TOP 500 BANK ADVISORS

Our ranking is more comprehensive than ever. See who came out on top.

By Lee Conrad

Welcome once again to Bank Investment Consultant's Top 50, our annual list of the best bank advisors. It's the holiday season, and we know full well that this page is akin to a card that's ignored in favor of the real presents. So by the time you read this, we'll assume you've already seen the list and the photos, and now you're wondering: How exactly was this ranked? We've continued to tweak our methodology, but in general we used the same approach we've used for the past two years.

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Brian Allsop



For the last 10 years, **Brian Allsop's** practice has focused on retirement planning aimed at providing clients with an inflation-adjusted income stream. He reports a client retention rate above 95% and standing as the No. 1 producing rep with his broker-dealer from 2008-2011.

Bank: Bank of Canton
Location: Canton, Mass.
TPM: Infinex Financial
2013 production: \$1 million
2012 production: \$709,000
2013 AUM: \$160 million
2012 AUM: \$135 million
Fee-based business: 62%
Product mix: Variable annuities 16%, REITs 9%, managed money 7%



Securities offered through INFINEX INVESTMENTS, INC. Member FINRA/ SIPC. B.O.C. Financial Services is a trade name of the Bank of Canton. Infinex and the bank are not affiliated.

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• NOT GUARANTEED BY THE BANK • MAY GO DOWN IN VALUE