

bank investment consultant

Insights and best practices for bank advisors

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bankinvestmentconsultant.com

TOP

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BANK ADVISORS

The best bank advisors in the industry keep upping the ante. To compile our annual Top 50 Bank Advisors list, we combine six variables into one composite score. And our high-producing advisors keep pushing the threshold ever higher with record numbers in just about every category.

This makes the list a tougher proposition for advisors, although also more interesting. Not knowing who will get toppled from the list or who will ascend to new heights—a function of the numbers—makes for a long wait each year.

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Brian Allsop

Bank: Bank of Canton

Location: Canton, Mass.

B/D: Infinex Investments, Inc.

2014 production: \$1.1 million

2013 production: \$1 million

2014 AUM: \$183.5 million

2013 AUM: \$160 million

Fee-based business: 66%

Total years as advisor: 15

Years in current job: 15

Brian Allsop serves a diverse client base, ranging from young couples focused on growth and wealth accumulation to retired individuals seeking a steady, inflation-adjusted income stream. He enjoys developing financial strategies that allow his clients to live more comfortably and confidently.



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