

## Financial Strategies Group Poised for 25% YE Revenue Growth After Just Six Months at OneDigital

### GROWTH SINCE JOINING ONEDIGITAL



### PARTNERSHIP RATIONALE

Rooted in strong community relationships, Jay's team joined OneDigital to deepen their impact in the markets they already served. By combining their local presence with OneDigital's integrated resources, they're now delivering more complete solutions to individuals and employers across their region.

### GROWTH CHANNELS THAT WORK

#### Workplace to Wealth

Direct access to employer clients and their employees through robust financial education and engagement tools.

#### Cultivating the OneDigital Ecosystem

OneDigital's expansive North Carolina presence - with nine offices and more than 1,500 employer clients - has become a powerful growth engine for Jay, fueling high-quality referrals and connections. In just six months, he's met with over 50 Employee Benefits and Retirement leaders, turning local collaboration into measurable opportunity.

#### Converged Market

Ability to cross-sell across Personal Lines, Employee Benefits and HR Consulting drives growth and retention among existing clients.

**50%** of New OneDigital Revenue Comes From Existing Clients

### ONE QUESTION, FOUR NEW PLANS

Recently, a OneDigital retirement consultant in Jay's market referred a plan participant with an allocation question. This participant, an attorney, connected Jay with his team. By highlighting financial planning as a value-added service within the firm's 401(k) relationship, Jay's team is beginning to unlock firmwide engagement.

**Jay's team is now working with firm partners to develop 4 separate financial plans... and they are just getting started**

### IF I HAD KNOWN WHAT I KNOW NOW



"I might have done this even sooner- I wouldn't trade my position with anyone else in the country right now. No 58-year-old man should have this much fun working."

- JAY HAGER