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# Mission, Values & What Makes Us Different

This document is foundational to everything Village does. Before you learn a platform, serve a client, or represent this firm in any capacity, you need to understand why Village exists, what we stand for, and what it means to carry this brand.

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## 01 / OUR STORY

### Where Village Came From

Village was not built in a boardroom. It was built at a desk, with a newborn in one arm and the trust of one client in the other.

Our founder, Olivia Allen, spent years inside the financial services industry, first as a licensed financial advisor in a commission-based environment, then as a CSA managing operations for multiple RIA firms simultaneously. She was good at the work. She was building systems, creating raving fans, and being asked to teach others, all while the organizations around her failed to build the resources those people needed to succeed.

The longer she did it, the more clearly she saw the same problem everywhere: advisors running their entire practice from memory, CSAs thrown into the deep end with no real training, and no formal resource anywhere that captured how this work was actually done at a high level. The knowledge lived in someone's head. When those people left, it walked out the door with them.

In June 2024, three months postpartum, Olivia walked away from a system she did not believe in and founded Village Financial Services. She started with one client, no co-founder, and no safety net. By December she hired her first employee.

**As of April 2026, Village has served 48 RIAs across all service lines and built a team of 12.**

*"Every single piece of my life led here. I just did not know it at the time."*

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## 02 / OUR MISSION

### Why Village Exists

Village exists to give independent RIA financial advisors the operational foundation they need to do their best work, so their clients receive the care they deserve.

We serve exclusively independent RIA firms that custody client assets at Schwab Advisor Services or Altruist. We go deep, not wide. Our team members are not generalists. They are specialists, expert in the exact platforms, workflows, and client service standards the firms we serve depend on.

Most people's financial future is shaped by someone they never see. Not the advisor. Like a duck gliding across the water, the financial advisor is the frontline, and Village is the driving force underneath, accelerating them forward. Processing paperwork. Scheduling meetings. Following up on the transfer that did not go through. Making sure the client who just lost their spouse is not waiting weeks for a callback. Anticipating what advisors and their clients need before they have to ask.

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## 03 / OUR VALUES

### What We Stand For

#### Hospitality as a Professional Standard

Before Olivia ever touched a financial platform, she managed one of the most prestigious inns in Princeton. She learned what it means to make someone feel genuinely cared for, not processed, not managed, but seen. That instinct is in everything Village does: the way we communicate, the way we prepare for meetings before anyone asks, and the way we treat every interaction as an opportunity to make someone's day easier instead of just completing a task. Financial planning is a trust business. Trust is built in the small moments. Hospitality is how you show up in those moments.

#### Deep Expertise Over Broad Reach

Village is expert to some rather than mediocre to many. We only serve advisors on Schwab and Altruist because depth of platform knowledge is what makes our team genuinely valuable. This is not a limitation. It is the reason our marketing works and our clients stay. "Expert to some instead of mediocre to many" is not just a tagline. It is the operating principle behind every hire, every client we take on, and every piece of content Olivia shares publicly.

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### Open-Handed with Knowledge

In an industry where expertise is typically hoarded as a competitive advantage, Village gives it away. Olivia's LinkedIn is essentially a public training manual for Schwab Advisor Center, shared freely for anyone who needs it. Advisors share her content with their own staff. Firms that will never be Village clients become better stewards to their clients because of it. The belief is simple: a rising tide lifts all boats. The more people doing this work well, the better the industry gets for everyone, especially the end client.

### Intentional Over Fast

Village goes slow to grow. We do not onboard a client until their FCSA is fully trained and tested to serve them. We hire for judgment, mission alignment, and resourcefulness before we hire for platform skills. We qualify clients carefully. We market precisely, for where our content does the most good, not for the farthest reach. A system that only works when everything goes right is not really a system, and it certainly is not scalable.

### People First

Village was built by a working mother who needed a model that made room for real life. Our team members set their own hours. They go to the school play, the doctor's appointment, the things that matter. Olivia protects that for her team the same way she built it for herself, because she built this while nursing a newborn, and she knows exactly what it costs when a workplace does not make room for you to be human first. The flexibility is not a perk. It is the structural foundation of the model.

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#### 04 / WHAT MAKES US DIFFERENT

## The Village Standard

Three things define Village in the market. They are connected, and all three must be present for the model to work.

### Platform Depth

Village team members are specialists in Schwab Advisor Center and Altruist, the two platforms serving the fastest-growing segment of the advisory industry. No other fractional support firm goes this deep. That expertise is what makes Village the obvious choice for the advisors we serve, and it is why advisors in this niche find us through content alone. We can speak directly to these people because we know their exact system. Nobody else is doing that.



### **Systems, Not Just Tasks**

Village does not just execute to-do lists. We build the operational infrastructure that advisors do not have time to build themselves: repeatable onboarding workflows, client service calendars, documented processes that scale with the firm. Most independent RIA firms have no documented systems. The advisor's knowledge lives in their head. Client service is reactive. There is no repeatable path. Village builds the path, and then we help clients run it. We convert reactive practices into scalable businesses.

### **Trust Built in the Small Moments**

Financial planning is a trust business. The advisor's reputation is built not just in planning meetings but in every follow-up call, every piece of correspondence, every moment a client feels like they matter. Our job is to make sure that trust is never broken by an unreturned call, a missed follow-up, or a client who felt like a number. Hospitality is how we show up in those small moments, and it is the standard we hold every member of this team to, every single day.