



FOUNDED IN

2013

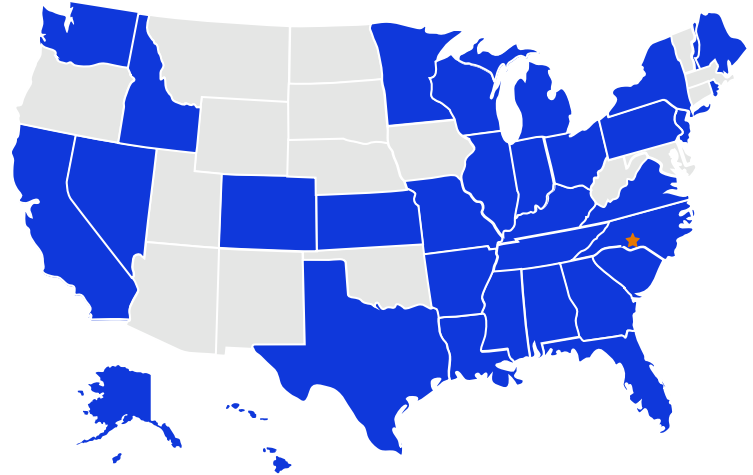
OUR CORE VALUES

ADVISOR-FIRST

OWN IT

POSITIVE ENERGY

28 STATES ADVISORS LOCATED IN
★ Headquartered in Charlotte, NC



\$22.4B

ASSETS SUPERVISED



257

ADVISORS



141

PARTNER FIRMS



22

EMPLOYEES

4

PARTNERSHIP PATHS

Create a New Partner Firm

Join an Existing Partner Firm

Minority Investment

Full Acquisition

2

AFFILIATION MODELS

HYBRID

- Multiple ways to grow revenue
- An OSJ that handles the heavy lifting of supervision
- Keep your existing brokerage relationships
- Access to our multi-custodian platform

RIA-ONLY

- Transparency with clients
- Shed the complexity of brokerage regulations
- Streamlined practice focused on planning
- Access to our multi-custodian platform

* Updated March 2026