&PARTNERS℠

Built by advisors, for advisors.

Designed for clients who seek the benefits of advice done well.

Who is &Partners?

&Partners was founded by a team of experienced executives who share a vision and steadfast dedication to building a wealth management firm where advisors and their clients can thrive.

This passion for putting advisors and their clients first defines &Partners. It fuels the firm's commitment to exacting service standards, innovative technology and a robust, flexible investment platform. The founders of &Partners are excited to leverage their knowledge and experience to build something better—a firm with a compelling offering for both advisors and their clients. The goal is simple: to change lives for the better by empowering financial advisors to deliver effective advice and planning.

&Partners' Advantages

At &Partners, employees and advisors share the pride of ownership. Ownership matters because it fosters accountability and alignment.

The focus of everyone at the firm is on helping advisors to serve client needs through more personalized guidance and tailored investment portfolios.

Partnership & Ownership

- As partners, advisors have the freedom and flexibility to run and grow their businesses on their terms.
- As owners, advisors can shape decisions in ways that benefit their clients and strengthen their practices.

Skilled & Responsive

- The leadership at &Partners understands the importance of responsiveness and organizational excellence. Everyone across the entire firm shares a strong commitment to outstanding service and high-quality engagement.
- At &Partners, the team is always on call and ready to address operational, investment or client-specific questions.
- The depth and breadth of experience at &Partners help ensure the firm can respond quickly and effectively to the needs of advisors and their clients.

Client Focused

- &Partners is built on the premise that every client has a unique story and distinct financial needs—from wealth building to legacy planning.
- Advisors at &Partners have the flexibility and choice to excel at what matters most: serving clients in highly personalized ways.

> ***The goal is simple: to change lives for the better by empowering financial advisors to deliver effective advice and planning.***

Experienced & Resourced

- The founders of &Partners bring deep knowledge and trusted relationships to their roles as leaders of the firm. They are also committed to partnering with the best.
- Their focus on building a robust platform across investing, insurance, banking and technology is at the core of the firm's distinct offering.

Some of &Partners' key providers include:

Envestnet—provides a broad network of data-driven services, products, tools and technologies designed for financial advisors

- Approximately $5 trillion in assets under administration
- Over 100,000 advisors on the platform
- Over 18 million customer accounts

Fidelity—offers global custody and recordkeeping services to individuals, institutions and financial advisors

- Over 8 million clearing and custody clients
- $11.7 trillion in assets under administration

Skience—builds technology solutions that improve data flow, productivity and customer satisfaction through better, more seamless integration

- 20+ years of experience in wealth management digital transformation
- Fully integrated with Salesforce and DocuSign
- WealthManagement.com 2022 award winner for CRM technology

*Statistics included herein for Skience, Envestnet and Fidelity have been provided directly from these vendors. Links and additional data are available upon written request. &Partners, LLC believes the data to be verified and accurate, but &Partners does not guarantee the accuracy, nor do any of its affiliates.

Visit us at andpartners.com