

Advisor stats at a glance

AS OF 06/30/2020



1,317¹

Producing Advisors
& Licensed Associates



525

Total Offices



18/3

Markets / Regions

AVERAGE
ANNUAL TGR
PER ADVISOR

\$419,000

BASED ON TOTAL ANNUAL REVENUE



AVERAGE
AUA

PER ADVISOR

\$64M

BASED ON TOTAL ASSETS UNDER ADMINISTRATION



ADVISORY AUA

46%

OF TOTAL AUA

ADVISORY TGR

69%

OF FIRM TGR

255

Advisors
with CFP®
Certification

¹924 financial advisors, 393 licensed associates as of 06/30/2020.