

osaic

osaic.com

**Empowering
you to thrive**



Get to know Osaic

Formed in 2016 — reimagined in 2023

With a history rich in growth and innovation, Osaic has always had one primary goal: to provide the best technology, resources, and services to our financial professionals so they can focus on their clients.



Our community



11,000+
Financial professionals



\$500B+
AUA



2,500+
Employees

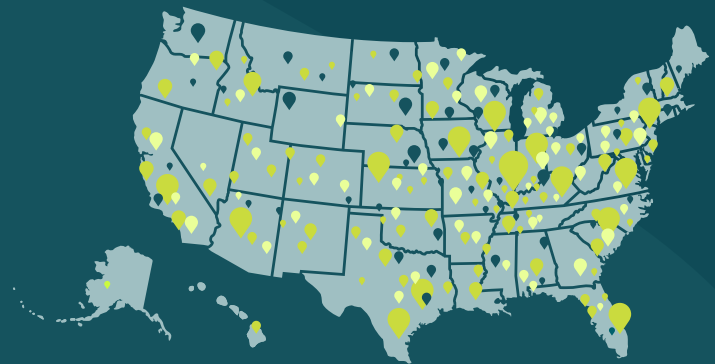


270+
Financial institutions



3,100+
Women financial professionals
#1 in the industry!*

Where you'll find us



Osaic has affiliated financial professionals across **all 50 states**.

*InvestmentNews, 2022: 24.9% of our affiliated financial professionals are women.



Delivering solutions and support

Our approach to the future of wealth management

Your clients rely on you to help them thrive and you need a partner who can deliver on more than just wealth management support. Osaic provides the tools and services you need to run your business, so you can focus on being the person your clients turn to in their most personal moments. At Osaic, we believe planning for the future should be transformative; not transactional.

Supporting you, your way

Our mission is to help you reach your fullest potential—as a business leader, a partner to your clients, and as a person.

We provide the resources you need so you and your clients can feel confident about their financial future and supported every step of the way.

As your partner in holistic wealth management, Osaic provides:



Business architecture designed for you

Your practice is your own. Whether you run your business independently, as part of a team, or as an employee of a financial institution, Osaic caters to your evolving needs. Regardless of how you choose to affiliate, you'll have the flexibility to run your business your way, while using Osaic's programs to manage your clients' assets.



A future for your legacy

Osaic's succession and acquisition team is dedicated to helping you prepare for the road ahead. Our award-winning programs provide acquisition assistance, lending solutions, succession planning, and business valuation tools to help grow your business and ensure your legacy is protected.



Flexible advisory solutions

With your choice of intuitive and powerful money management tools, you can manage assets internally or outsource to well-known institutional money managers, regardless of your affiliation channel.



Foundational support for growing your practice

Attract the right talent and seamlessly onboard new financial professionals with Osaic's recruiting and transition programs. You can focus on growing your business while Osaic offers support and resources to help your business flourish.



Opportunities at every stage of your business

No matter where you are in your business life cycle, Osaic provides solutions to help you achieve your goals, whether that is improving profitability, growing your client base, or creating a continuity plan. From business inception to business exit, our experts have you covered.



Through growth and celebration

Harmony at scale

Osaic's suite of backend support includes:



A centralized and **customizable business dashboard** so you can find everything in one spot.



Cybersecurity tools, resources, insurance, and teams whose sole purpose is to **protect you and your business from cyber threats**.



An **easy-to-use account management platform** that allows you to open accounts online, reduce administrative tasks, and enhance a client's onboarding experience.



In-house experts and researchers who offer **portfolio management resources and market commentary** so you can help your clients make the best decisions for their future.



A **team of compliance and supervision experts** who can help you navigate today's ever-changing regulatory landscape with tailored policies, holistic training, guidance, and systems that make it easy to **keep your business compliant**.



A suite of **automated marketing platforms**, backed by a team of marketing experts to help you **design and execute your marketing plans**.



Cultivating connections

Celebrating every voice

We use our scale and resources to cultivate an environment of belonging where everyone can find their unique peer groups and place, because we are stronger together than we are separately.

Osaic believes in the power of community and bringing people together through:



Relationships

- Peer advisory boards and councils that provide Osaic with strategic direction, guided by ideas and feedback, so you will always have a seat at the table.
- Accessible executives and staff who lead diverse, multigenerational groups that are focused on your growth and evolution.
- Dedicated teams that offer a deep level of expertise, guidance, and care in supporting you and your staff in all aspects of your business.



In-person and virtual connections

- Innovative event experiences with renowned speakers, informative workshops, and cutting-edge technology designed to encourage networking and education.
- Peer groups that meet based on geographic location, similar business structure, and a desire to be an independent entrepreneur but not feel isolated.
- Mentorship opportunities, online social communities, and study groups so you can learn from like-minded people and those who inspire you to think differently.



Find your home at Osaic

Contact us today

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