



Who is Osaic?

Osaic is the behind-the-scenes partner for your Financial Professional. We're home to a diverse, service-driven community that believes planning for the future should be transformative, not transactional. Our rich history and continual focus on growth and innovation means your Financial Professional has access to premier investment and advisory planning services, high-net-worth solutions, insurance protection products, and more.

Osaic believes wealth management is for everyone. That's why we're committed to ensuring your Financial Professional is equipped with everything they need to target your specific objectives and help you feel more financially confident. Osaic is one of the nation's largest independent wealth management firms, and we believe strongly in our primary goal of empowering your Financial Professional to provide objective, non-proprietary counsel and recommendations, *placing your unique needs above all else.*

Expansive resources for you and your Financial Professional.



2,700+
Employees



11,000+
Financial Professionals

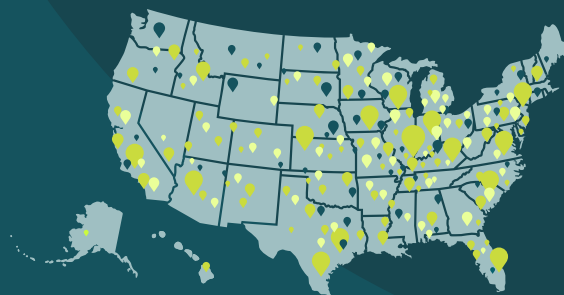


\$700B+
In Client Assets



4M+
Clients Nationwide

Where you'll find us.



Roots dating back to 1958. Reimagined in 2023.

2016

Advisor Group becomes an independent firm

Reverence Capital Partners acquires a majority stake in Advisor Group

2019

Advisor Group acquires Ladenburg Thalmann Financial Services

2020

Advisor Group acquires American Portfolios Financial Services & Infinex Financial Holdings

2022

2023

Advisor Group's eight firms unite as Osaic Wealth, Inc.

Osaic acquires Lincoln Wealth business from Lincoln Financial

2024

Osaic and your Financial Professional provide:



Strength & stability behind your financial plan and future retirement.



Maximum choice when selecting investments and financial solutions for your needs.



Flexibility to manage your portfolio efficiently and aligned with your plan.



Ability to borrow against your investments when life's unexpected needs occur without affecting your portfolio's future.



Secure 24/7 access to your portfolio through innovative technology & cutting-edge cybersecurity.



Access to valuable in-house financial services when you need them during life: tax and estate planning; retirement planning; trusts, family, and business planning; wealth transfers, deferred compensation, charitable giving, and pension maximizations.