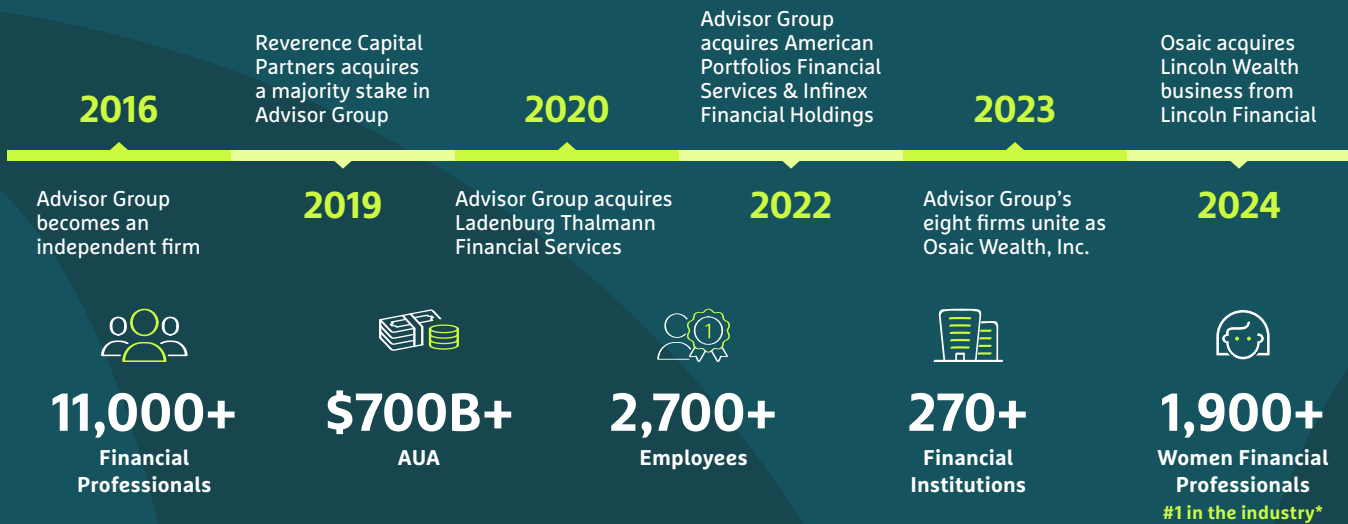




Your partner in financial independence

Roots dating back to 1958. 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.



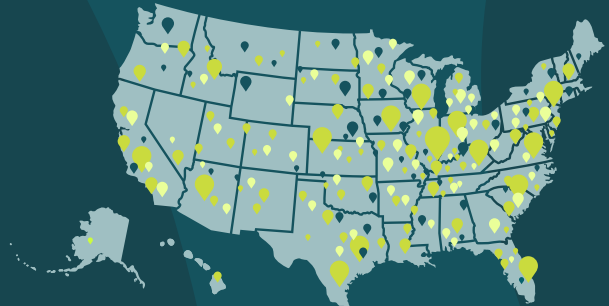
Osaic is home to:

- Industry-leading intuitive money management tools, practice management coaching programs, and cybersecurity resources and technology that continually evolve to enhance the client experience and protect your business.
- Women Forward, a leading initiative in corporate responsibility and diversity.**
- A three-time award-winning succession and acquisition program.†

Delivering solutions and support.

Our mission is to help you reach your fullest potential — as a business leader, a partner to your clients, and as a person. We believe that planning for the future should be transformative; not transactional. We provide the resources you need so you and your clients can feel confident about their financial future. From flexible advisory solutions to foundational tools for growing your practice to acquisition assistance and legacy planning, we're here to support you during every stage of your business.

Where you'll find us.



Osaic has affiliated Financial Professionals across **all 50 states**.

Get in touch.

Contact us to have a conversation about how we can address your unique needs.

- Call:** 844-256-4624
- Email:** hello@osaic.com
- Visit:** [osaic.com](https://www.osaic.com)

* financial-planning.com, Aug. 20, 2024: 16% of Osaic's Financial Professionals are women, totaling the highest number among the Magazine's Top 12.
 ** wealthmanagement.com — Wealthie Award, 2020.
 † wealthmanagement.com — Industry Awards.