



Your partner in financial independence

Osaic is the behind-the-scenes support for your Financial Professional. We believe wealth management is for everyone, and that's why we're committed to ensuring your Financial Professional has access to the right solutions to help you create and execute a plan to grow and protect your wealth.

As the second largest independent wealth management firm in the U.S., our rich history in growth and innovation is behind our primary goal of enabling your Financial Professional to provide objective, non-proprietary advice and recommendations, placing your needs above all else.

A strong network to help you thrive.



2,500+
Employees



11,000+
Financial
Professionals

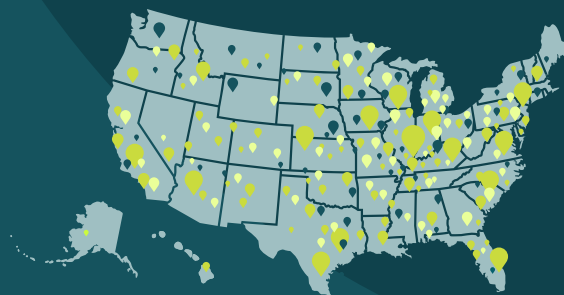


\$500B+
In Client
Assets



4M+
Clients
Nationwide

Where you'll find us.



Formed in 2016. Reimagined in 2023.

2016

Advisor Group
becomes an
independent firm

Reverence Capital
Partners acquires
a majority stake in
Advisor Group

2019

2020

Advisor Group acquires
Ladenburg Thalmann
Financial Services

Advisor Group
acquires American
Portfolios Financial
Services & Infinex
Financial Holdings

2022



2023

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

Why your Financial Professional chose Osaic:



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.

Securities and investment advisory services are offered through the firms: Osaic Wealth, Inc., Triad Advisors, LLC, and Osaic Institutions, Inc., broker-dealers, registered investment advisers, and members of FINRA and SIPC. Securities are offered through Securities America, Inc., American Portfolios Financial Services, Inc., and Ladenburg Thalmann & Co., broker-dealers and member of FINRA and SIPC. Advisory services are offered through Arbor Point Advisors, LLC, American Portfolios Advisors, Inc., Ladenburg Thalmann Asset Management, Inc., Osaic Advisory Services, LLC, and Securities America Advisors, Inc., registered investment advisers. Advisory programs offered by Osaic Wealth, Inc., Securities America Advisors, Inc., and Triad Advisors, LLC, are sponsored by VISION2020 Wealth Management Corp., an affiliated registered investment adviser.