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Arete - Overview



Meet Arete Wealth.

Arete Wealth is a full-service Broker-Dealer, Registered Investment Advisor and Insurance firm. The company offers wealth management for high-net worth individuals and institutions, alternative investments, venture capital and private equity programs. Headquartered in Chicago, the firm's wealth products and services are offered nationwide through licensed advisors and branch offices.

“Creativity in wealth management is seeing opportunities that bring balance to fit each client's investment goals. At Arete Wealth, we confidently bring unique products to our clients because we take the time to get to know their needs, and invest more time in due diligence.”

Josh Rogers, Founder & CEO, Arete Wealth

THE ARETE WEALTH DIFFERENCE

Portfolio Balancing

We believe every portfolio needs to have a percentage allocated to “racehorse” opportunities that can bring the kind of returns to drive out-performance.

Unique Investment Access

Our creative and carefully-vetted partnerships bring alternative investment opportunities to our clients they cannot get elsewhere.

Guidance Through Risk

We're not under any illusions about the risk that accompanies investments and guide our clients with thoughtful counsel.

A Deeper Research Bench

To evaluate investment opportunities, we use an extensive due diligence model, adapted from some of the top private equity firms in the industry.



ARETE WEALTH BY THE NUMBERS

33
BRANCH
OFFICES

140
MORE THAN 140 SENIOR
WEALTH ADVISORS

85+
PREFERRED PRODUCT
PARTNERS & ALTERNATIVE
INVESTMENTS

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Disclosures (<https://www.aretewealth.com/disclosures/>) | Business Continuity Plan

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