
YOUR LEGACY

Are you ready to take your advisory firm to the next level? Are you an employee who wants to own your own business? **Edwards Wealth Management (EWM)** offers you a partnership that will help you achieve your business goals and benefit your clients.

Our team works directly with advisors every step of the way, from pre-planning and business formation to platform transition and ongoing business operations. You will find the freedom to operate your business and build your legacy the way you envision.

WHY CHOOSE EDWARDS WEALTH MANAGEMENT?

Edwards Wealth Management is a custody-agnostic enterprise RIA that delivers the comprehensive resources independently-owned advisory firms need to run your business more efficiently and serve your clients more effectively. Employee-based advisors launching a new firm benefit from our consultative approach that helps map your path to independence. **When you partner with EWM, your success comes first.**

THE EWM DIFFERENCE →

LEARN MORE →

A LEGACY YOU CAN **BUILD ON**

Benjamin F. Edwards is a national wealth management company headquartered in St. Louis, MO. We understand what it takes to operate your dream business...we started Edwards in 2008 but have built it upon a 130-year family legacy. We purposefully remain a privately-owned company, fully in control of our destiny. We can operate with patience and with our values front and center.

As we've grown to a firm with more than \$25 billion in assets under management, we are convinced of the power of entrepreneurship and partnership. Benjamin Edwards has both a registered investment advisory firm as well as a full-service broker-dealer, catering to business owners and employees alike. Our team of more than 600 professionals serve our advisors and their clients across 27 states.

SUCCESS STORIES

At Edwards Wealth Management, we deliver the back office your business deserves, giving you more time for what you do best. We look forward to working together with you as business partners and are committed to helping you build your legacy.

Dunlop Investment Group

“My father and I have been business partners for more than ten years but have always been employees of a larger firm. We decided we wanted to own our own advisory business—we wanted the freedom to serve our clients our way but also needed to address a near-term business succession. It’s a complicated business so we wanted help getting started and handling the ongoing business operations and risk management. The partnership with EWM has helped us get further, faster than we would have on our own.”



– Connor Dunlop, Principal, Dunlop Investment Group

BUILD YOUR LEGACY

CONNECT WITH EWM

Let’s discuss how we can help you build your legacy.

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