

Independent wealth management
partner to exceptional

CPA wealth management firms

Growth

Growth

High performing CPA firms demand profitable growth even in difficult times. We help firms create lasting momentum through sustainable growth strategies.

GROW YOUR FIRM

Interested in learning how 1st Global can help you and your firm?

[CONTACT US](#)

The Power of Partnership

1st Global has the support and proven professional systems needed to give you the competitive edge in providing comprehensive wealth management services. [Learn more »](#)



Experience

An independent partner helping CPA firms grow from success to significance for over 25 years.

[Learn more »](#)



Platforms

An expansive, fee-based platform built specifically for our CPA wealth management partners.

[Learn more »](#)



CPA Community

A nationwide community of high-achieving CPAs supporting each other's success.

[Learn more »](#)



Service

We take special pride in providing excellent service and support to our firms.

[Learn more »](#)

Insights and Research



Demystifying Commodities and the Role They Play in a Diversified Portfolio



Photo Ready Tips: Posing Like a Champion



Benefits to Keeping Your Internet Browser Up to Date



Photo Ready Tips: Dress for Success



Data Security While Traveling Internationally

What Do Investors Really Want?

Believe it or not, there's an easy way to find out what clients want from their CPAs: talk to them.

We surveyed emerging affluent and affluent investors to find out what they look for in financial advice providers, as well as what is most important to them in those interactions.

LEARN MORE

1st Global News

1st Global news and announcements, media resources, the financial industry, the economy: if it's in the news, you'll find it here.

READ MORE

1st Global to Attend CPAsNET 26th Annual Meeting in Nashville, TN

June 13, 2019

1st Global will be a sponsoring attendee at the CPAsNET 26th Annual Meeting in Nashville, Tennessee, June 18–20, 2019.

[Read more »](#)

1st Global to Sponsor PrimeGlobal Partner Leadership Conference in Chicago

June 12, 2019

1st Global will be a sponsoring attendee at the PrimeGlobal Partner Leadership Conference in Chicago, Illinois, June 19–21, 2019.

[Read more »](#)

Patrick Di Fazio Featured in U.S. News and World Report

June 10, 2019

1st Global's Patrick Di Fazio, director of wealth management consulting, was recently quoted in the U.S. News and World Report article "How to Gift Stocks..."

[Read more »](#)

Find your place at 1st Global

APPLY NOW

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