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FOR IMMEDIATE RELEASE

Growth Story

How Edwards Got It Right: Benjamin F. Edwards Opens 100th Location

ST. LOUIS, Jan. 7, 2025 -- Benjamin F. Edwards, whose roots date back to 1887, is making history by opening its 100th location. It's a record breakthrough representing a continuing, present-day story of growth transcending the number of advisors and significant financial achievements.

"We're celebrating this historic milestone, which we believe affirms our business model of putting the interests of our advisors and their clients first," said Tad Edwards, chairman, CEO and president of Benjamin F. Edwards based in St. Louis. "We're thankful to our financial advisors who have made this possible by entrusting their treasured clients to our growing firm.

Team Effort

"It's a team win that everyone can be proud of and build upon, representing just the beginning of an even brighter future," Tad said.

Benjamin F. Edwards's roots trace back to the former A.G. Edwards, founded by Tad Edwards's great-great-grandfather, Albert Gallatin Edwards, in 1887. A.G. Edwards was once the nation's largest brokerage firm outside New York.

First Office in 2009

The 100th location in Wyoming, Mich., opened in December with three advisors. The firm opened its first location in Springfield, Mo., in 2009. It's a time that Springfield Branch Manager, Managing Director-Investments Tim Reese remembers well.

"Tad's vision for Edwards was nimble and responsive, with a single focus -- to serve. Who wouldn't want to be a part of that environment?" Tim said. "There aren't individual egos that get in the way of consensus or progress.

"I am loyal to Edwards; there's a tangible sense this enterprise is part of a much higher mission greater than any of us individually."

Today, the firm employs 737 people, including 328 advisors. It offers a traditional business arrangement and an independent model called Edwards Wealth Management, a registered investment advisor.

Tad said: “We are proud of our history and remarkable success, but we must continue to look toward the future so our clients reap the benefits of the latest financial planning technologies and advice strategies. We’re a firm of the future built generations ago on a strong, principled foundation.”

As the firm looks ahead to 100-plus locations and continues to add experienced and new advisors to existing locations, tremendous opportunities abound.

This includes expanding into new larger markets, further developing existing locations and teams with experienced advisors, and laying the foundation for the next generation through the firm’s advisor trainee program launched in 2021.

Edwards prioritizes building a firm with an unwavering commitment to integrity, character and trust. Over the past decade, the firm has carefully chosen to grow in ways consistent with its culture and values, ensuring that those who join share its vision.

“We seek quality over quantity – choosing entrepreneurial advisors who value freedom and independence and want to partner with a leadership team they can know and trust,” Tad said. “Advisors who join Edwards embrace the opportunity to create wealth through equity ownership in the private firm, achieve their goals and enjoy a fulfilling, fun career journey.”

‘Growing’ Against the Grain

Benjamin F. Edwards takes a different approach from many of its competitors, providing every client -- regardless of portfolio size -- with a financial advisor dedicated to them.

Instead of relying on call centers, the employees in the home office respond to the advisors’ requests and know them by name.

“This relationship-driven model has been a key factor in attracting financial advisors nationwide as the firm works toward its goal of expanding the Edwards brand into new locations and growing the number of advisors in all 100-plus locations,” Tad said. “By building strong relationships with advisors and taking the time to understand their business models, we help them and their clients succeed.

“As we often say, ‘We still prefer to pick up the phone ourselves and speak directly with anyone who needs our help, whether it’s a client or an advisor.’ It’s the type of service our clients and advisors have come to expect.”

Benjamin F. Edwards is one of the largest privately owned companies in St. Louis.

About Benjamin F. Edwards

With a legacy spanning 137 years over six generations of the Edwards family, Benjamin F. Edwards today is an entrepreneurial wealth-management enterprise welcoming client-first, full-service financial advisors to join the firm. Advisors at Edwards seek to render solid investment advice while helping clients develop a plan to reach their goals. The growing national firm is now in 34 states with 100 locations and over \$47 billion in assets under management. It remains true to its Golden Rule roots in

the treatment of clients, financial advisors, employees and all partners. The home office in St. Louis knows advisors by name and eschews call centers to get advisors' questions answered. Leveraging the firm's distinguished heritage and vision for the future, those who desire can become advisors of the firm's broker-dealer, Benjamin F. Edwards. Alternatively, they can choose an independent affiliation with the firm's registered investment advisor (RIA), Edwards Wealth Management. Edwards's strong fiscal foundation and timeless values enable it to be a firm of "Client-First Service Second-to-None," offering friendly support and thoughtful, tailored investment and planning advice to its treasured clients who make it all possible. The firm has zero debt and is committed to staying independent through future generations.

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