About NewEdge Advisors

WE SUPPORT SUCCESSFUL FINANCIAL ADVISORS

Founded in 2015, NewEdge Advisors is an SEC Registered Investment Advisor (RIA) supporting a network of over 220 financial advisors across the nation.

NewEdge was built *by* advisors *for* advisors to give independent advisory practices a better way to serve clients. The NewEdge platform provides advisors with access to various capabilities and resources, including investments, custody, technology, research, and more.

Although each advisory team operates independent practices, we provide a platform that encourages a culture of collaboration and idea-sharing across the network.

Collectively, NewEdge Advisors is shaping the future of independent advice and helping American families prepare for their financial future.

NewEdge ADVISORS

How We Support Your Financial Advisor

Practice Management & Business Support: Our staff of professionals is solely focused on supporting the practice management and business needs of our affiliated partners providing them with the flexibility to manage their client relationships.

Compliance: The experienced Compliance team at NewEdge Advisors provides sophisticated compliance oversight to ensure all practices are operating under the most up-to-date federal and state regulatory requirements.

Custodial Access: We provide Investment Adviser Representatives (IARs) with connectivity to the industry's largest and most trusted custody and clearing platforms. NewEdge Advisors does not directly custody client assets.

Investment Management Solutions: NewEdge Advisors provides access to elective proprietary and 3rd party investment management solutions. The firm utilizes its size and scale to reduce the normal cost to access such solutions.

Back-Office & Operations Support: Our home office provides back-office support to independent advisor practices and their staff, so they can focus more of their time serving their clients.

Human Resources: Our firm assists independent practices with staffing, candidate sourcing, problem-solving, payroll, and benefit services.

CORPORATE SNAPSHOT

$16.8B*
Assets Serviced

65,000+
Client Accounts Serviced

122
Branch Office Locations

4
Custodial Partners

charles SCHWAB | LPL Financial | Fidelity INVESTMENTS | RAYMOND JAMES

220
Financial Advisors

45
NewEdge Advisors Support Staff

As of 11/01/2021

Let's talk.

For more information call (504) 459-4391 or
www.newedgeadvisors.com.

*Assets Serviced reflects advisory assets of $11,921,608,804 and brokerage assets of $4,972,124,043 as of 11/1/2021.