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News Update from Benjamin F. Edwards

**Growing St. Louis Brokerage Firm Benjamin F. Edwards Thrives in Pandemic Economy**

**(ST. LOUIS, Oct. 27, 2021)** — Benjamin F. Edwards has announced that it has hired 20 financial advisors so far this year including the addition of one new branch. What's more, the firm just welcomed another independent advisory firm to the fold, Elkhorn Private Wealth, based in Lexington, Ky., Edwards' first office in Kentucky.

With a legacy spanning 135 years over five generations of the Edwards family, Benjamin F. Edwards today is an entrepreneurial wealth management enterprise welcoming client-first, full-service financial advisors to join its ranks. 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 30 states with over 80 locations, garnering close to \$40 billion in assets under management. It remains true to its Golden Rule roots with regard to treatment of clients, financial advisors and employees. The home office in St. Louis knows advisors by name and provides a concierge service to get advisors' questions answered.

Leveraging the firm's distinguished heritage and vision for the future, advisors have the option to be employees of Benjamin F. Edwards or can choose an independent affiliation with the firm's registered investment advisor, (RIA) Edwards Wealth Management.

The firm's strong fiscal foundation and timeless values enable it to be a firm of "Client-First Service Second-to-None," offering sincere support and thoughtful, tailored investment and planning advice to its treasured clients who make it all possible.

"We are very pleased to share this positive growth news including who we are as a firm and what we represent," said Benjamin F. "Tad" Edwards, founder, chairman, CEO and president of Benjamin F. Edwards in Clayton. "As a result, we have been fortunate in being able to find talented people to join us."

**Commitment to Planning**

To continue to thrive, the firm must excel in providing personal, interactive and comprehensive financial planning, Tad said.

"I believe a large part of our strategy is staying close to our clients to the degree that we can even 'finish their sentences,' and also developing deep relationships with our clients' families and next generation."

Edwards has provided the structure and support for a planning foundation to include a deep bench of planning experts who answer their own phones when advisors have a question or need a consultation

about a client's financial needs. Edwards' technology integrates with other firm systems and allows collaboration with clients.

Demonstrating its commitment to planning, the firm recently announced that it will cover the cost of obtaining a financial planning designation for advisors who enroll in such a program and meet the designation's rigorous planning standards.

### **More Growth Ahead**

Meanwhile, the firm expects hiring to continue, and for the first time in its history, Edwards will initiate an advisor training program in addition to seeking experienced advisors.

Tad, (great-great grandson of the founder of nationwide brokerage firm A.G. Edwards established in 1887), says many financial advisors today are searching for a firm who they know is committed to putting clients' interests first. In addition, advisors desire a firm they can trust as well as have a voice with the top leadership team.

### **Client-First Service**

The firm's initiatives and strategies are focused on enhancing the client-advisor experience first and foremost. For example, the firm understands the importance of serving clients' families and would never turn away a client's young family member or client referral who's interested in establishing a relationship with one of the firm's advisors regardless of the amount of assets available to invest. "We encourage our clients to think of their advisor as the family chief financial officer," says Chris Keller, director of Business Services.

### **A Home for Independent Advisors**

Tad believes Edwards is a home or even a refuge for financial advisors who want support to manage their own destiny.

"We are fully supportive of the advisors' needs to grow their business in a structure that best suits them," Tad said. "As a result, we continue to see strong growth in both our traditional employee-advisor model and our independent affiliation model."

Providing advisors the flexibility they cherish in growing their business and a personalized transition package gives us an edge in attracting advisors to the firm, said Chief Operating Officer Doug Rubenstein. "We provide financial advisors the opportunity to be as independent as they want to be without sacrificing needed support in running their business."

Working in an environment of "Trust, Integrity and Mutual Respect" along with adherence to the Golden Rule and client-first culture are welcome relief for our advisors, Tad says. "We see each other as our work family, our 'home away from home.'"

### **About Benjamin F. Edwards**

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