

2013

JUL. 2013

Launched Steward Partners, LLC

SEP. 20131st Steward Partners Advisor: **Theodore Schwab** joins Steward Partners in Washington, DC**DEC. 2013**

First three advisors join Steward Partners: Ted Schwab, Chris Reaney and Rick Pignone

2015

MAY 2015

5th location - Bethesda, MD location launched

DEC. 2015

Steward Partners crossed \$1B in assets

2017

JUL. 2017

Steward Partners recognized as "Best Place to Work" by Washington Business Journal (#1)

AUG. 2017

Steward Partners featured on the cover of Financial Planning Magazine

NOV. 2017

- Steward Partners 1st Symposium in Washington, DC
- Washington Business Journal recognizes Steward Partners as Fastest Growing Company (#13)

DEC. 2017

Advisor & CAM Council formed

2019

MAR. 2019

Steward Partners receives \$50 Million Minority Stake from Cynosure

APR. 2019

InvestmentNews Names Steward Partners as "Best Place to Work" for Financial Advisors

MAY 2019

Steward Partners Recognized as "Best Place to Work" in Washington Business Journal (#1 – 3 years in a row)

AUG. 2019

INC 5000 Fastest Growing Companies Recognition

DEC. 2019

- Washington Business Journal Ranks "Fastest Growing to Companies" (3 years in a row)
- Welcomes 200th Partner

2021

JUN. 2021

- Steward Partners Secures \$100M Investment from The Pritzker Organization
- Steward Partners Global Advisory Named a "Best Place to Work" (5 years in a row)

JUL. 2021

The Washington Post names Steward Partners Global Advisory as a "Top Workplace" in 2021

SEP. 2021

Steward Partners ranks #20 on Barron's 2021 List of Top 100 RIA Firms

DEC. 2021

Steward Partners celebrates 300 Partners



STEWART PARTNERS GLOBAL ADVISORY

2014

FEB. 2014

Launches New York City location

JUN. 2014

Steward Partners Board of Directors established

DEC. 2014

Welcomes 25th partner

2016

JAN. 2016

Steward Partners RIA Registered with SEC

NOV. 2016

Jim Gold featured on Kathy Ireland Worldwide Business – FOX TV

DEC. 2016

Steward Partners reaches \$4B AUM

2018

APR. 2018

1st Profit Share distribution

MAY 2018

Steward Partners Recognized as "Best Place to Work" by Washington Business Journal (#1)

SEP. 2018

INC 5000 Fastest Growing Companies Recognizes Steward Partners

NOV. 2018

Washington Business Journal names Steward Partners "Fastest Growing Companies" (#13)

2020

JUN. 2020

1st Affiliate Partner Joins Steward Partners in St. Louis, MO

SEP. 2020

- Steward Partners Named to Inc. 5000 (3 years in-a-row)
- Steward Partners Honored as a "2020 Best Places to Work" in Greater Washington Area (4 years in a row)
- Steward Partners Acquires Umpqua Investments with \$3.4B in AUM

OCT. 2020

Steward Partners Ranked #24 on Barron's 2020 List of Top 100 RIA Firms

DEC. 2020

Steward Partners crosses \$100M in Revenue and \$15B in AUM

2022

JUN. 2022

Steward Partners launches broker/dealer operations and multi-custodial model

JUL. 2022

Steward Partners Global Advisory Named a "Best Place to Work" (6 years in a row)

SEP. 2022

Steward Partners Ranked Among Barron's Top 100 RIA Firms for Third Consecutive Year

NOV. 2022

Steward Partners Secures \$140 Million Credit Facility with Apogem Capital



STEWARD THROUGH THE YEARS

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Securities and investment advisory services offered through Steward Partners Investment Solutions, LLC, registered broker/dealer, member FINRA/SIPC, and SEC registered investment adviser. Investment Advisory Services may also be offered through Steward Partners Investment Advisory, LLC, an SEC registered investment adviser. Steward Partners Investment Solutions, LLC, Steward Partners Investment Advisory, LLC, and Steward Partners Global Advisory, LLC are affiliates and separately operated. AdTrax 5079403.1 Exp 11/24