

2013

JUL. 2013
Launched Steward Partners, LLC

SEP. 2013
1st 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



STEWARD 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)



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