



THE NEXT EVOLUTION IN
WEALTH MANAGEMENT

www.stewardpartners.com

A dark blue, monochromatic photograph of a city skyline, likely New York City, with several prominent skyscrapers. The image is overlaid with a white rectangular frame containing the title text.

STEWARD PARTNERS
THROUGH THE YEARS
2013-2025

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 joined Steward Partners: Ted Schwab, Chris Reaney and Rick Pignone

2014

FEB. 2014

Launched New York City location

JUN. 2014

Steward Partners Board of Directors established

DEC. 2014

Welcomed 25th partner

2015

MAY 2015

5th location launched – Bethesda, MD

DEC. 2015

Steward Partners crossed \$1B in assets

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 crossed \$4B 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

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

DEC. 2017

Advisor & CAM Council formed

2018

MAY 2018

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

APR. 2018

1st Profit Share distribution

SEP. 2018

INC 5000 Fastest Growing Companies recognized Steward Partners

NOV. 2018

Washington Business Journal recognized Steward Partners as Fastest Growing Company (#13)

2019

MAR. 2019

Steward Partners receives \$50M minority stake from Cynosure

APR. 2019

InvestmentNews named 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 recognized Steward Partners as Fastest Growing Company (3 years in a row)
- Welcomed 200th Partner

2020

SEP. 2020

- Steward Partners named to Inc. 5000 (3 years in a row)
- Steward Partners recognized as a “Best Place to Work” (4 years in a row)
- Steward Partners acquired Umpqua Investments

OCT. 2020

Steward Partners ranked #24 on Barron’s 2020 List of Top 100 RIA Firms

DEC. 2020

Steward Partners crossed \$100M in revenue and \$15B in AUM

2021

JUN. 2021

- Steward Partners secured \$100M investment from The Pritzker Organization
- Steward Partners recognized as a “Best Place to Work” (5 years in a row)

JUL. 2021

The Washington Post named Steward Partners as a “Top Workplace” in 2021

SEP. 2021

Steward Partners ranked #20 on Barron’s 2021 List of Top 100 RIA Firms

DEC. 2021

Steward Partners celebrated 300 Partners

2022

JUN. 2022

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

JUL. 2022

Steward Partners recognized as a “Best Place to Work” (6 years in a row)

SEP. 2022

Steward Partners ranked #32 on Barron’s 2022 List of Top 100 RIA Firms (3 years in a row)

NOV. 2022

Steward Partners secured Credit Facility with Apogem Capital

2023

FEB. 2023

First Pershing Advisory Team joined Steward Partners

APR. 2023

USA Today Best Advisory Firms List

MAY 2023

6th Annual Symposium in Nashville, TN

JUL. 2023

Steward Partners celebrated 10th anniversary

SEP. 2023

Steward Partners ranked #19 on Barron's 2023 List of Top 100 RIA Firms (4 years in a row)

OCT. 2023

First RIA-only advisor joined

DEC. 2023

Steward Partners acquired Freedom Street

2024

JAN. 2024

Steward Partners Rebrands Partnership

MAY 2024

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

AUG. 2024

Steward Partners named to Inc. 5000 "Fastest-Growing Private Companies"

SEP. 2024

- Steward Partners ranked #18 on Barron's 2024 List of Top 100 RIA Firms (5 years in a row)
- Jeff Gonyo named Steward Partners Head of Wealth Management

DEC. 2024

Steward Partners ranks on Financial Planning's "Best RIA to Work for List"

2025

APR. 2025

Ranked 10th on USA Today's Best Financial Advisory Firms

MAY 2025

Recognized for 8th year in Washington Business Journal's Best Place to Work List

JUL. 2025

Ranked as a Top RIA by Financial Advisor Magazine for 2025

AUG. 2025

Ranked as an Inc. 5000 Fastest-Growing Private Companies

SEP. 2025

- Relocated HQ from New York City to Stamford, CT
- Ranked #9 on Barron's Top 100 RIA Firms
- Named to AdvisorHub's Inaugural 'RIA Firms to Watch in 2026' List
- Named to InvestmentNews' Inaugural 2025 5-Star RIA Firms List

NOV. 2025

Jim Gold, Scott Danner, and Mohan Gurupackiam Recognized in InvestmentNews' 2025 Hot List

DEC. 2025

- Steward Partners Secures \$475 Million in Strategic Capital from Ares
- Named to Financial Planning's 2025 Best RIAs to Work For List
- Keith Taylor named Chairman of the Board of Directors



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Securities are offered through Steward Partners Investment Solutions, LLC ("SPIS"), registered broker/dealer, member FINRA/SIPC. Investment advisory services are offered through Steward Partners Investment Advisory, LLC ("SPIA"), an SEC-registered investment adviser. SPIS, SPIA, and Steward Partners Global Advisory, LLC are affiliates and collectively referred to as Steward Partners.

All recognition award information can be found on Steward Partners' website at <https://www.stewardpartners.com/Important-Disclosures.35.htm>