



CADARET GRANT

Cadaret, Grant Expands Wealth Management Platform - Launches Lending Solutions

November 20, 2018

SYRACUSE, N.Y. - -Cadaret, Grant & Co., Inc., a subsidiary of Atria Wealth Solutions, announced today that it is launching a jumbo mortgage loan and lending solution program for advisors and their clients through a strategic partnership with BNY Mellon. These advanced lending capabilities will provide Cadaret, Grant advisors with the ability to structure personalized lending solutions to meet the ongoing needs of their high net worth clients and become a key component in delivering comprehensive financial solutions.

“This most recent addition to the Cadaret, Grant product platform signifies our aggressive advances in supporting advisors with solutions they need to best serve their clients,” said Doug Ketterer, CEO and President of Cadaret, Grant and CEO and Co-founder of Atria Wealth Solutions. “Our mission is to partner with financial advisors to determine how we can best support them in their practices and deliver the needed capabilities as quickly and efficiently as possible. A suite of lending capabilities is just one example.”

Cadaret, Grant’s growing advisor base will now have the ability to offer jumbo mortgage and lending solutions to meet the specific needs of their high net worth clients. These solutions provide flexible access to funds for financial opportunities, unexpected life events or strategic financial positioning.

“We are proud to have partnered with BNY Mellon, the nation’s oldest, and one of the most respected, private banks, to help our advisors expand the breadth and depth of their client relationships,” said John Picone, Atria’s Head of Investment Solutions. “It’s another step in our continued strategy to reinforce Cadaret, Grant’s unparalleled commitment to providing advisors with high quality differentiated solutions.”

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About Cadaret, Grant & Co., Inc.

Cadaret, Grant, an independent broker/dealer headquartered in Syracuse, New York, is a wholly-owned subsidiary of Atria Wealth Solutions and supports more than 800 financial advisors in 459 branch offices nationwide. Founded in 1985, the company provides superior service, advanced technology, effective marketing tools, and a supportive business environment for financial advisors. For more information about Cadaret, Grant, please visit www.cadaretgrant.com.

About Atria Wealth Solutions

Atria Wealth Solutions (Atria) is a wealth management solutions holding company focused on elevating the end-to-end experience for financial advisors and their clients. Headquartered in New York City, Atria's core mission is to empower financial advisors with a next-generation set of tools, services and capabilities that drive growth in today's rapidly changing wealth management environment. Atria, through its subsidiaries, supports over 1400 financial advisors with more than \$50b of assets under administration. For more information, please visit www.atriawealth.com