

## Atria's Cadaret Grant Adds OSJ Team to Growing Independent Wealth Management Firm

*\$600m team joins Cadaret Grant*

**New York, NY – June 25, 2019** – [Cadaret Grant](#), an independent wealth management firm and wholly-owned subsidiary of [Atria Wealth Solutions, Inc.](#) (Atria), today announced that a team of 12 advisors have joined the firm. The New Jersey-based team, led by Bert Riley, brings \$600 million to the growing independent wealth management firm.

“Adding a practice of this magnitude to Cadaret Grant is evidence of the value advisors find in partnering with us,” said Doug Ketterer, CEO. “In a rapidly evolving industry, advisors recognize the steps we’ve taken and are continuing to take to position them to lead their practices into the future utilizing our technology, products and support services.”

“A core tenet of our vision for Atria has been to establish a value proposition within our subsidiaries that appeals to the highest quality advisors – those who share our vision for the future of wealth management,” said Kevin Beard, Chief Growth Officer. “We are very excited that Bert and his accomplished team are joining Cadaret Grant and look forward to a successful partnership.”

“Our main focus when looking for a wealth management firm was to find one that provides the tools and practice management guidance necessary to allow us to better serve our clients. We could not find a better match than Cadaret Grant and Atria,” said Bert Riley. “We were impressed not only by the accessibility of senior management, but also by the firm’s commitment to aiding our team’s growth.”

Atria is committed to supporting each and every advisor of its subsidiaries through its substantial investments in resources, services and technology in order to ensure they can meet the needs and demands of their current and future clients.

###

### **About Cadaret, Grant & Co., Inc.**

Cadaret Grant, an independent wealth management firm headquartered in Syracuse, New York is a wholly-owned subsidiary of Atria Wealth Solutions and supports over 700 financial advisors in 436 branch offices nationwide. The firm was founded in 1985 to serve entrepreneurial advisors with technology and support for their independent businesses. More information on Cadaret Grant can be found at [www.cadaretgrant.com](http://www.cadaretgrant.com).

### **About Atria Wealth Solutions, Inc.**

Atria Wealth Solutions, Inc. (Atria) is a wealth management solutions holding company focused on delivering a clear path to the future of financial advice for advisors and their clients. Headquartered in New York City, Atria’s broker-dealer subsidiaries empower financial institutions and independent advisors with a sophisticated set of tools, services, and capabilities that drive growth. Atria’s broker-dealer subsidiaries include Cadaret, Grant & Co., Inc., CUSO Financial Services, L.P., NEXT Financial Group, Inc. and Sorrento Pacific Financial, LLC, which together support nearly 2,000 financial advisors with more than \$65B of assets under administration. For more information, please visit [www.atriawealth.com](http://www.atriawealth.com).

### **CONTACT INFORMATION**

FiComm Partners  
Kathleen Hopkins  
[Atria@ficommpartners.com](mailto:Atria@ficommpartners.com)