

## **Atria's Cadaret Grant Adds Four Offices with Nearly \$600 Million of AUA**

**New York, NY– June 17, 2020** – [Cadaret Grant](#), an independent wealth management firm and wholly-owned subsidiary of [Atria Wealth Solutions, Inc.](#) (Atria), today announced that four independent representative offices, collectively bringing close to \$600 million of assets under administration (AUA), have joined the firm.

In the rapidly changing wealth management environment, financial professionals are seeking long-term strategic partners they can count on to help them grow and meet the expectations of their clients. Atria's significant investments in technology, practice management and client solutions have centered on how financial professionals and financial institutions can best serve the needs of their clients and help build deep, long-term relationships with them. "Over the last several months, our conversations with financial professionals who are looking for a different type of relationship with their broker-dealer has intensified," said Kevin Beard, Chief Growth Officer at Atria. "How our broker-dealers approach relationships with independent representatives is different. It is about understanding where they want to go with their business and how we can align the full strength of our firm to support them in achieving their goals."

One of the four offices, Sobrinski Financial Services, is headquartered in eastern Pennsylvania and manages nearly \$100m of AUA. "We've worked very hard to expand our geographic footprint over the last 20 years, but we have higher aspirations," said John Sobrinski, Sr. "We were looking for a firm who truly cared about us. The access and attention Atria gave us across the board, from the founders to the senior team, was amazing. We believe it's truly who they are. Advisors have a lot of broker-dealer options, especially for a practice our size, but choosing Cadaret Grant and Atria was an easy decision for us."

Atria's five broker-dealer subsidiaries serve nearly 2,500 financial professionals and over 200 financial institutions with approximately \$75 billion of AUA. Atria is committed to ensuring each and every financial professional and financial institution across its subsidiaries have the solutions, technology and support they need to grow their businesses and better serve their clients.

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

Cadaret Grant, an independent wealth management firm headquartered in Syracuse, New York is a wholly-owned subsidiary of Atria and supports over 700 financial professionals in more than 400 branch offices nationwide. The firm was founded in 1985 to serve entrepreneurial financial professionals 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 financial professionals, financial institutions and their clients. Headquartered in New York City, Atria's broker-dealer subsidiaries empower financial institutions and independent financial professionals with a sophisticated set of tools, services and capabilities that drive growth. Atria's broker-dealer subsidiaries include CUSO Financial Services, LP, Sorrento Pacific Financial, LLC, Cadaret Grant & Co., Inc., NEXT Financial Group, Inc. and Western International Securities, Inc. Atria's subsidiaries together support nearly 2,500 financial professionals with more than \$75 billion of assets under administration. For more information, please visit [www.atriawealth.com](http://www.atriawealth.com).

### **CONTACT INFORMATION**

FiComm Partners  
Abbie Sheridan  
[abbie.sheridan@ficommpartners.com](mailto:abbie.sheridan@ficommpartners.com)  
(917) 636-4803