



THE NEXT EVOLUTION IN  
WEALTH MANAGEMENT

[www.stewardpartners.com](http://www.stewardpartners.com)

STEWARD PARTNERS  
**THROUGH THE YEARS**  
2013-2024

**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

**2013**

**MAY 2015**

5th location launched – Bethesda, MD

**DEC. 2015**

Steward Partners crossed \$1B in assets

**2015**

**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

**2017**

**2014**

**FEB. 2014**

Launched New York City location

**JUN. 2014**

Steward Partners Board of Directors established

**DEC. 2014**

Welcomed 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 crossed \$4B in assets

**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)



### 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

2019

### JUN. 2021

- Steward Partners secured \$100M investment from The Pritzker Organization
- Steward Partners recognized as a “Best

### 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

2021

### 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

2023

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

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

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”





**STEWARD**  
— PARTNERS —

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