

Cadaret Grant & Company was founded over 35 years ago by two pioneers of the independent business model for financial professionals. They shared a vision of independent advice that benefits clients, not the firm with the name on the door.

In 2018, Cadaret Grant was acquired by Atria Wealth Solutions, Inc., a leading wealth management solutions company that empowers financial professionals to create deep, lasting client relationships through exceptional support, industry-leading technology and innovative thinking.

1985

Cadaret Grant is founded as one of the nation's first independent broker-dealers.

900+

Number of financial professionals Cadaret Grant partners with in locations across the country.

\$23B

Assets under advisement our financial professionals serve and support.

0

Number of proprietary products offered by Cadaret Grant.

1,200

Number of unique, fee-based portfolios available to Cadaret Grant clients.