

# Fast Facts



Driven by our purpose of making a difference in the lives of our financial advisors, their clients, and our associates. Guided by our core values—integrity, commitment, flexibility, and kindness.

## Who We Are

### Internally controlled

Decisions made with financial advisors in mind

### Founded in 1981

Nearly 45 years<sup>1</sup> of supporting independent financial advisors

### Committed to financial advisor success—

industry-leading support, compliance, and transition services

### Built for growth

Providing the tools and flexibility for financial advisors to thrive

## Strength and Stability

**\$1.88B** in gross revenues<sup>2</sup>

**\$235B** in assets under advisement<sup>3</sup>

**#7** largest broker-dealer based on gross revenue<sup>4</sup>

**#9** independent broker-dealer in total account assets<sup>5</sup>

**#9** fastest-growing independent broker-dealer<sup>6</sup>

## A Leading Independent Firm

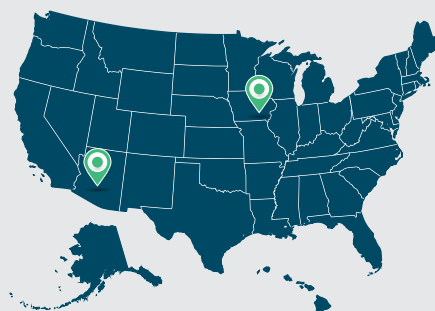
**900** home office associates providing personalized support

**4:1** financial advisor to associate ratio for dedicated service

**61%** of Cambridge associates are women

## Nationwide Reach

Home office locations in Fairfield, Iowa and Phoenix, Arizona



## Financial Advisor Community

**4,000**

producing  
financial advisors

**18%**

of Cambridge financial  
advisors are women

**16%**

of Cambridge financial  
advisors are under 40

**885**

Cambridge CFPs®

## Flexible Financial Solutions



Diverse business  
models: RIA, Corporate  
RIA, Hybrid, Fee-only,  
Brokerage



No proprietary  
products—offering a  
broad selection of  
investment opportunities

All data as of 6/30/2025

<sup>1</sup>Cambridge and its predecessor broker-dealer.

<sup>2</sup>Year to date actual annualized

<sup>3</sup>AUA (Assets Under Advisement) reflects fee-based and independent RIA assets plus commission assets.

<sup>4</sup>Based on total revenue. Ranking received in InvestmentNews Magazine's 2024 independent broker-dealer industry survey rankings.

<sup>5</sup>Ranking received in Financial Planning Magazine's 2024 IBD Elite survey rankings.

<sup>6</sup>Based on revenue growth. Ranking received in Financial Planning Magazine's 2024 IBD Elite survey rankings.

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