KESTRA FINANCIAL, INC.

About **Kestra Financial, Inc.**

Kestra Financial, Inc. is an industry-leading wealth management organization focused on reinvention, integrity, and advocacy of financial professionals. We passionately work alongside financial professionals to help them pinpoint and reach their clients' personal financial goals.

AN EXPANSIVE WEALTH MANAGEMENT FIRM

2,500+
Financial Professionals

Assets Under Advisement[1] — **$113 billion**

Assets Under Management[2] — **$43+ billion**

Our Reach

Kestra Financial	Kestra Private Wealth Services	H.Beck	Arden Trust Company	Bluespring Wealth Partners
Independent Financial Professionals	Wirehouse Exiters	Community Based Financial Professionals	Personal Trust Company	Succession Solutions

Our History

- 2000 — Kestra Financial formed under NFP
- 2003 — IPO launch as a Public Company
- 2008 — Strategic decision to accelerate growth
- 2012 — Fusion Advisor Network is purchased
- 2013 — NFP goes private with Madison Dearborn Partners
- 2014 — Kestra Private Wealth Services is purchased
- 2016 — Kestra Financial spins off with Stone Point Capital
- 2017 — H. Beck is purchased
- 2018 — Reliance Trust Company of Delaware is purchased
- 2019 — Bluespring Wealth Partners is established; Kestra Financial recapitalizes with Warburg Pincus

Publicly Traded Company

Kestra Financial, Inc. is the parent company of Kestra Investment Services, LLC, member FINRA/SIPC, Kestra Advisory Services, LLC, Kestra Private Wealth Services, LLC, H. Beck. Inc., member FINRA/SIPC, Arden Trust Company and Bluespring Wealth Partners, LLC. Securities offered through Registered Representatives of Kestra Investment Services, LLC or H. Beck Inc. Investment advisory services offered through Investment Advisor Representatives of Kestra Advisory Services, LLC, Kestra Private Wealth Services, LLC or H. Beck, Inc. For more information about Kestra Financial, visit www.kestrafinancial.com.

1. As of Dec. 31, 2019, assets include Kestra Investment Services, LLC, Kestra Advisory Services, LLC, Kestra Private Wealth Services, LLC, Kestra Institutional Services, H. Beck, Inc., and Arden Trust Company.
2. As of Dec. 31, 2019, assets include Kestra Advisory Services, LLC, Kestra Private Wealth Services, LLC, Kestra Institutional Services, H. Beck, Inc., and Arden Trust Company.

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