



Hightower Corporate Profile

As a Hightower advisory business, RJ Wealth Management is part of an elite community of independent-minded financial advisors you can trust. All Hightower advisors are fiduciaries, meaning we are obligated to act in your best interest. We take the time to get to know you and your family, to understand your hopes and dreams, the lifestyle you want to achieve and concerns you may have for the future, so you can live the story you choose.

By combining radical transparency, integrity and sophistication, we are reshaping the financial services industry from the inside out.

National Recognition

Established in 2008, Hightower's sophisticated platform and growing national presence has attracted some of the industry's most successful financial advisors. With 98 advisor businesses across 33 states, our advisors and firm have received prestigious industry recognition for growth and excellence.

Awards & Accolades

Forbes

- Best-In-State Wealth Advisors, 2016-2020
- America's Top Next-Generation Wealth Advisors, 2017-2019

Barron's

- Top 1,200 Advisors by State, 2012-2020
- Top 100 Independent Advisors, 2013-2018
- Top 100 Women Advisors, 2012-2017

Inc.

- Inc. 5000, 2012-2017

The Financial Times

- FT300 Top RIAs, 2015-2018

Founded

2008

Headquarters

Chicago

Offices (nationwide)

85*

Advisors

223*

Employees

500+*

Advisor Teams

105*

PF Total Client Assets (AUA)

(*As of 03/31/20)

78.3b

Hightower AUM

(*As of 3/31/20)

50.8b

** Unless otherwise stated, all data current as of 05/08/2020.*

Hightower Client Advantages

Benefits

Hightower does not manufacture or sell proprietary financial products to clients. Instead, quality vendors and other strategic partners compete for advisors' and their clients' business. This model enables advisors to develop a custom mix of products and solutions tailored to each client's needs.

Assets

At Hightower, client assets are safely held by strong, third-party custodians such as Fidelity Investments, Charles Schwab & Co, Inc., Pershing and TD Ameritrade. We work with reliable, secure and independent firms like these based on rigorous due diligence and high standards of operational excellence, security and service.

Technology & Reporting

Hightower advisors leverage secure, high-quality performance reporting tools to build customized wealth management and investment reports. Clients access account information and a consolidated view of their overall net wealth via our secure, digital Client Portal.

Support

From access to 1,000+ third-party investment managers and negotiated vendor pricing, to cybersecurity and exclusive intellectual property and resources, Hightower provides advisors with strong foundation to support clients and their families.

Hightower Securities, LLC, member FINRA and SIPC & Hightower Advisors, LLC a registered investment advisor with the SEC. All securities are offered through Hightower Securities, LLC and advisory services are offered through Hightower Advisors, LLC.



505 5th Avenue, 14th Floor
New York, NY 10017
(917) 580-6042
<https://rjwealth.hightoweradvisors.com/>