

PRESS RELEASE

&Partners wraps breakout year, reinforcing advisor-owned model as momentum builds into 2026

ST. LOUIS, January 14, 2026 (GLOBE NEWSWIRE) — &Partners, the advisor- and employee-owned wealth management firm redefining independence in financial advice, closed 2025 with a series of milestones underscoring the appeal of its ownership-driven model.

During 2025, &Partners surpassed **105 advisor practices**, which represent approximately **\$51 billion in prehire assets** and **\$365 million in annualized revenue**, positioning the firm among the fastest-growing hybrid broker-dealer and RIA platforms in the industry.

“We’re building a firm where advisors and their clients come before everything else,” said David Kowach, CEO and cofounder of &Partners. “Together, we’re redefining what partnership in wealth management can be.”

Ownership and alignment drive growth

&Partners is structured as a true partnership, with equity broadly distributed across advisors and employees. Advisors who join become owners, aligning long-term incentives across advisors, clients, and the home-office team, an approach that continues to differentiate the firm in a highly competitive industry.

“Our advisors aren’t just participants in our success; they’re the architects of it,” said John Alexander, &Partners cofounder. “By giving them real equity, true autonomy, and the tools to serve clients at the highest level, we’ve built a model that’s attracting top talent and helping deliver exceptional outcomes.”

The firm has also taken a deliberate approach to scale, intentionally capping growth at approximately 150–175 advisor teams to preserve culture, collaboration, and service quality.

Strong momentum among women advisors

In 2025, &Partners continued to attract a notably diverse group of advisors. About 40% of its advisor practices are led by women, well above industry norms.

“This wasn’t the result of a diversity-focused recruitment initiative, but rather a reflection of the advisors who are drawn to a model built on transparency, client-centricity, and alignment,” said Kristi Mitchem, cofounder of &Partners.

Industry recognition and looking ahead

&Partners' rapid growth has attracted attention from industry trade publications, including *AdvisorHub*, *Barron's*, *Financial Advisor IQ*, *InvestmentNews*, and *Wealth Management*, which have cited the firm among the fastest-growing independent and hybrid wealth management firms.

Kristi Mitchem was also named to *Wealth Management's* "[Ten to Watch in Wealth Management in 2026](#)," highlighting her leadership in building &Partners' advisor-first investment platform and shared ownership philosophy.

Founded in 2023 by Mitchem, Kowach, and Alexander, &Partners was created to combine the culture of boutique advisory firms with institutional-quality investment capabilities, modern technology, and concierge-level support — without the conflicts often associated with scale.

"As we head into 2026, our focus remains the same," Mitchem said. "Building a firm where advisors are fully aligned with one another and with management, and where clients can benefit from advice that is truly uncompromised."

About &Partners

[&Partners](#) is a rapidly growing, advisor-owned wealth management firm built for advisors seeking greater ownership, flexibility, and community. Founded by former Wells Fargo leaders and based in Nashville, Tennessee, and St. Louis, Missouri, the firm offers a hybrid model that combines competitive payouts with equity participation, institutional support, and access to a collaborative peer network. Having quickly grown to 105 practices with approximately \$51 billion in prehire assets as of December 31, 2025, &Partners provides a platform where advisors can build lasting businesses on their terms without sacrificing service, scale, or culture. Clearing and custody services are provided by National Financial Services LLC, a Fidelity company. Our mission is to change financial lives for the better by providing highly personalized advice that seeks to avoid missteps and optimize opportunities. To learn more, visit andpartners.com.

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