THE WEALTH TEAMS & ADVISOR M&A WEEKLY

Week of Nov 9

Qualifying advisor moves fall to 18 from 42 in week to Nov. 13

RIA and wealth deals also fell, to 85, as closings outnumbered announcements for the first week in the 12-week series.



The numbers

Advisor moves, the week

18

▼ −24

11 team moves, 3 breakaways

Reported book in motion

$25.5B

As reported, for 12 of 18 moves

RIA deals, the week

85

▼ −56.5

Change vs the four-week average

Wirehouse departures to independence

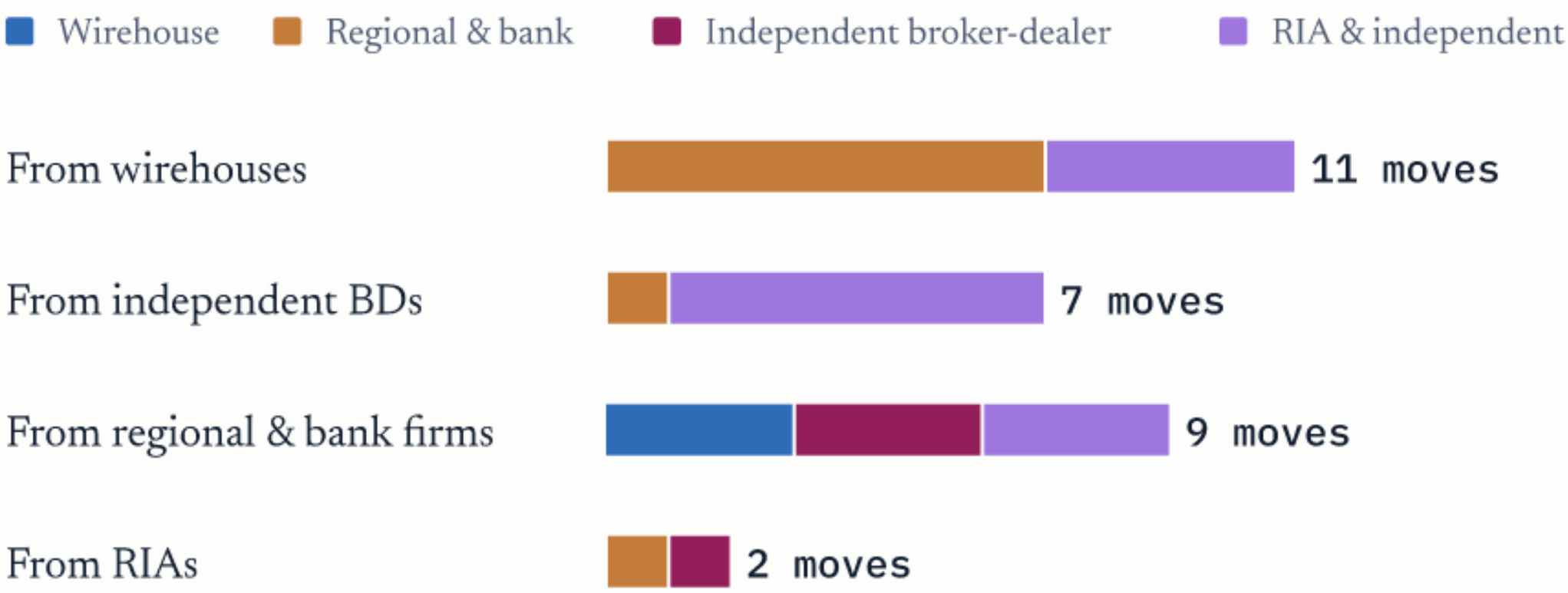
21.1%

4 of 23 classified, four weeks

CHART 1

Where advisor moves went, by origin channel

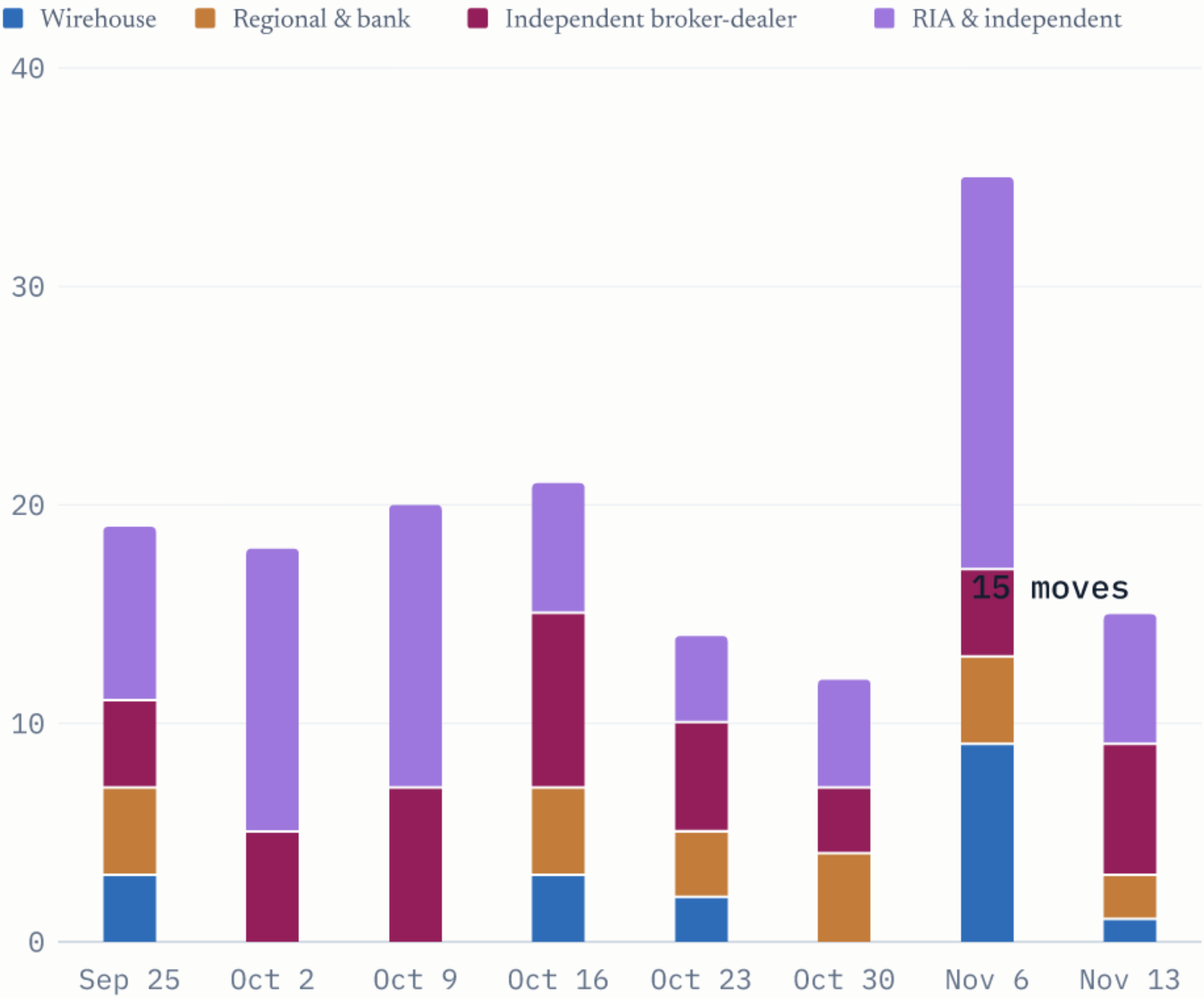
Four weeks of moves with both firms classified



Source: PWD Moves Wire, editor-reviewed · Nov 13, 2026

CHART 2

Advisor moves by destination channel, by week

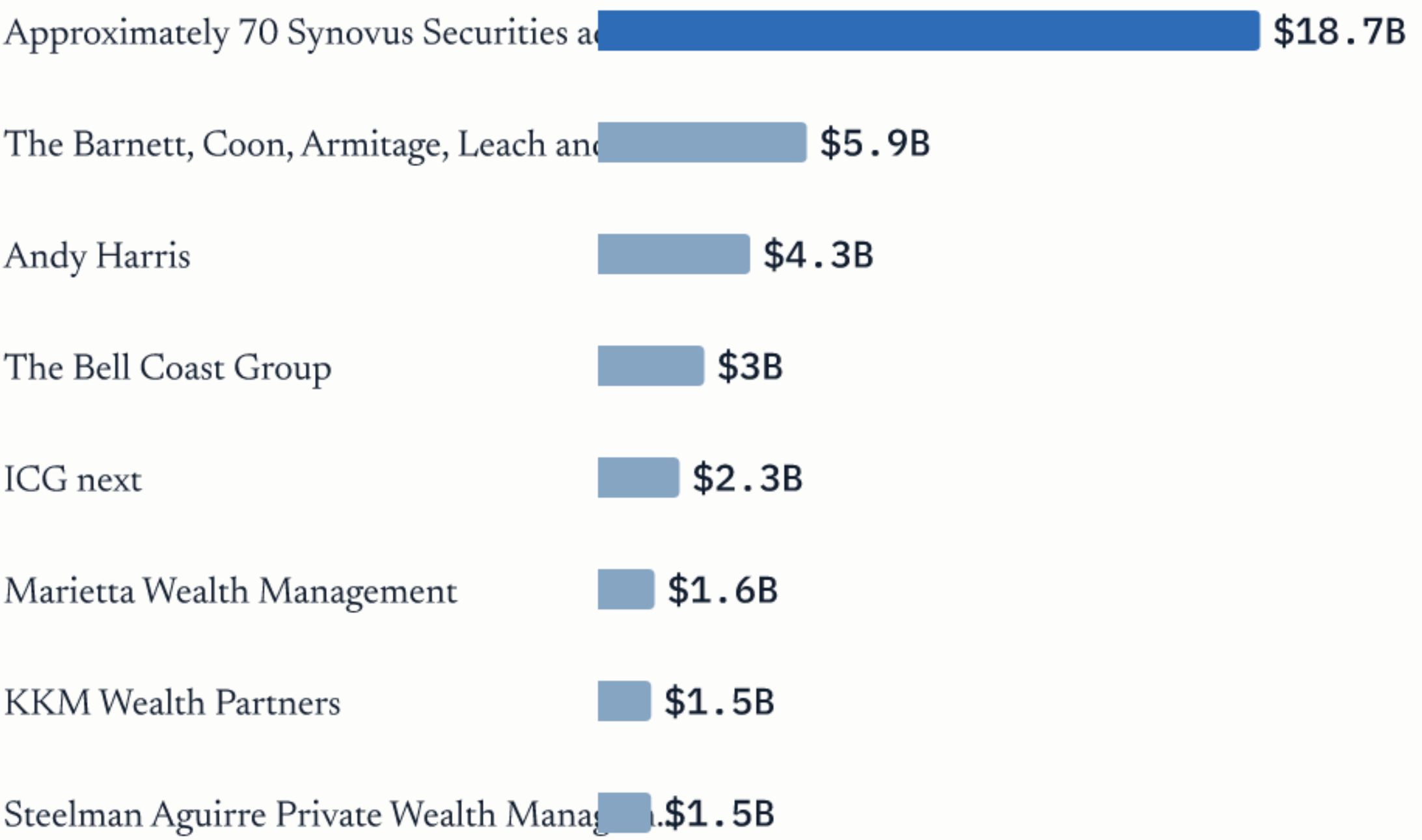


Source: PWD Moves Wire, editor-reviewed · Nov 13, 2026

CHART 3

Largest team moves by reported book, four weeks

Book as reported in coverage, not verified

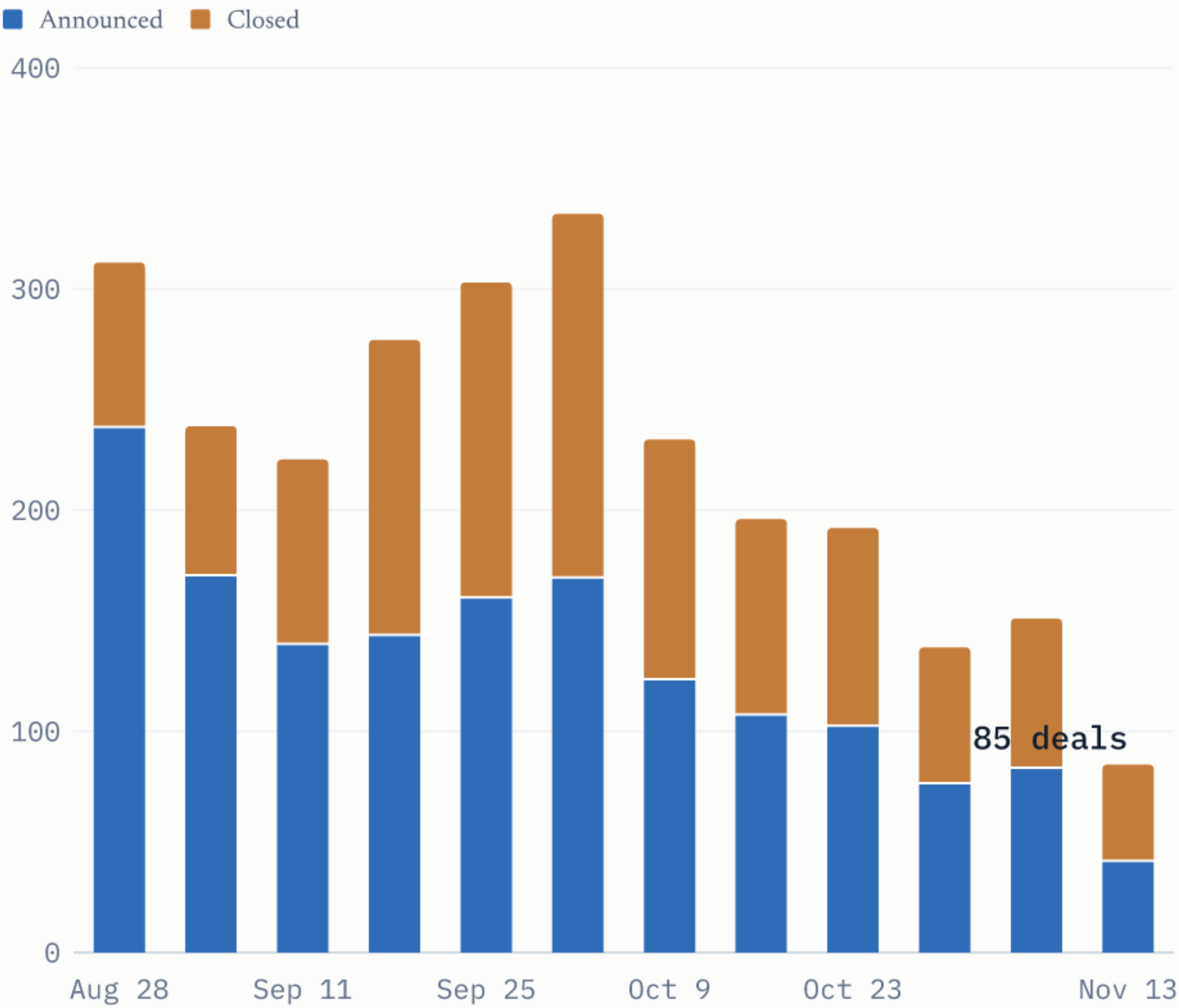


Source: PWD Moves Wire, editor-reviewed · Nov 13, 2026 privatewealthdaily.com

CHART 4

RIA and wealth deals by week

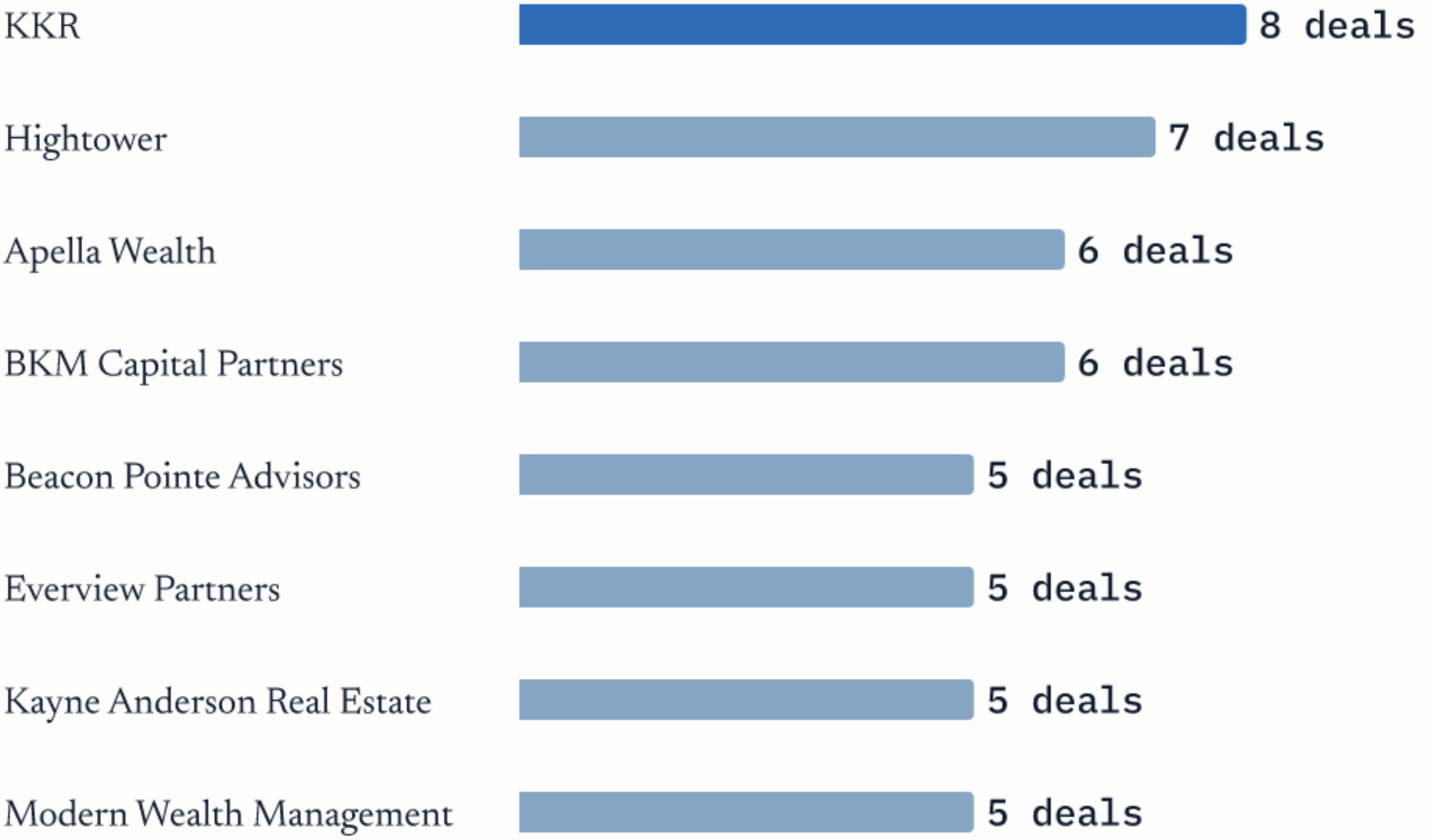
Announced and closed, twelve weeks



Source: PWD deal records from published coverage ·…

CHART 5

Most active acquirers, twelve weeks



Source: PWD deal records from published coverage ·…

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