THE WEALTH TEAMS & ADVISOR M&A WEEKLY

Week of Nov 23

Regional and bank firms logged eight advisor moves to RIAs' two

Raymond James rose from twelfth to third on the four-week recruiting leaderboard after six arrivals in the latest week.



The numbers

Advisor moves, the week

20

▼ −1

15 team moves, 1 breakaway

Reported book in motion

$10.7B

As reported, for 16 of 20 moves

RIA deals, the week

75

▼ −36

Change vs the four-week average

Wirehouse departures to independence

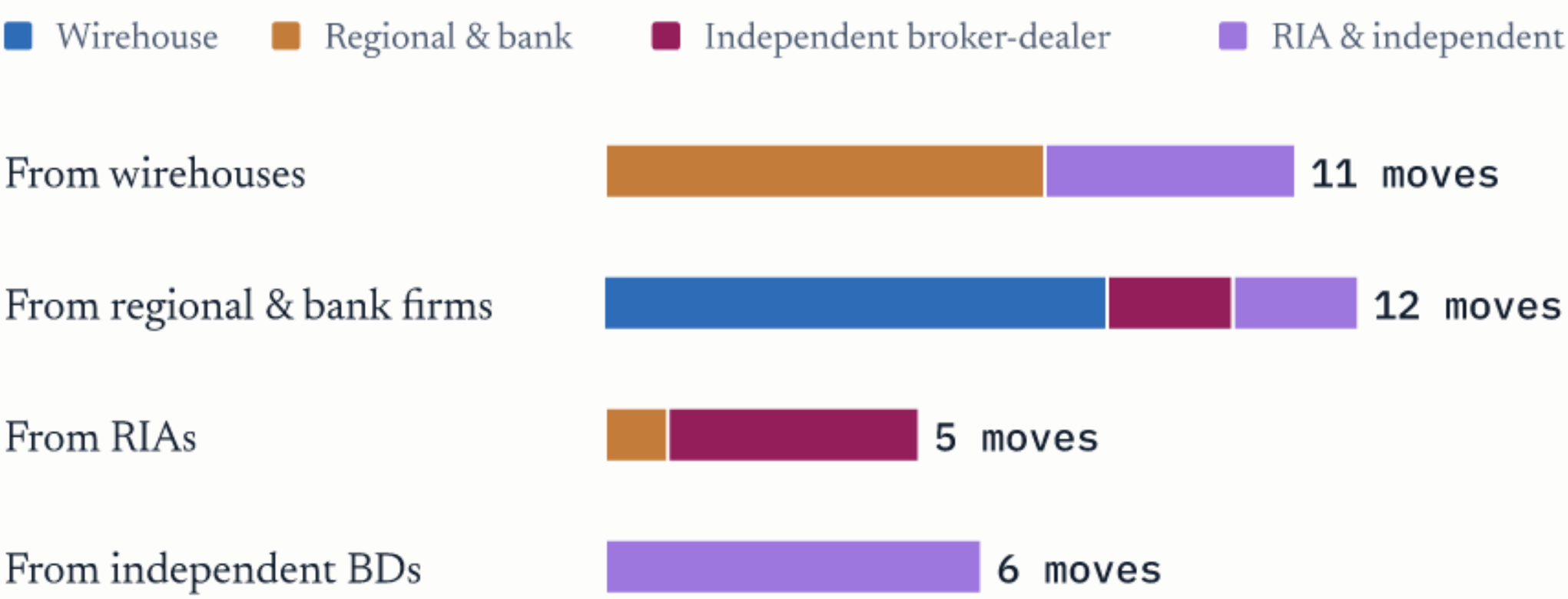
20%

4 of 23 classified, four weeks

CHART 1

Where advisor moves went, by origin channel

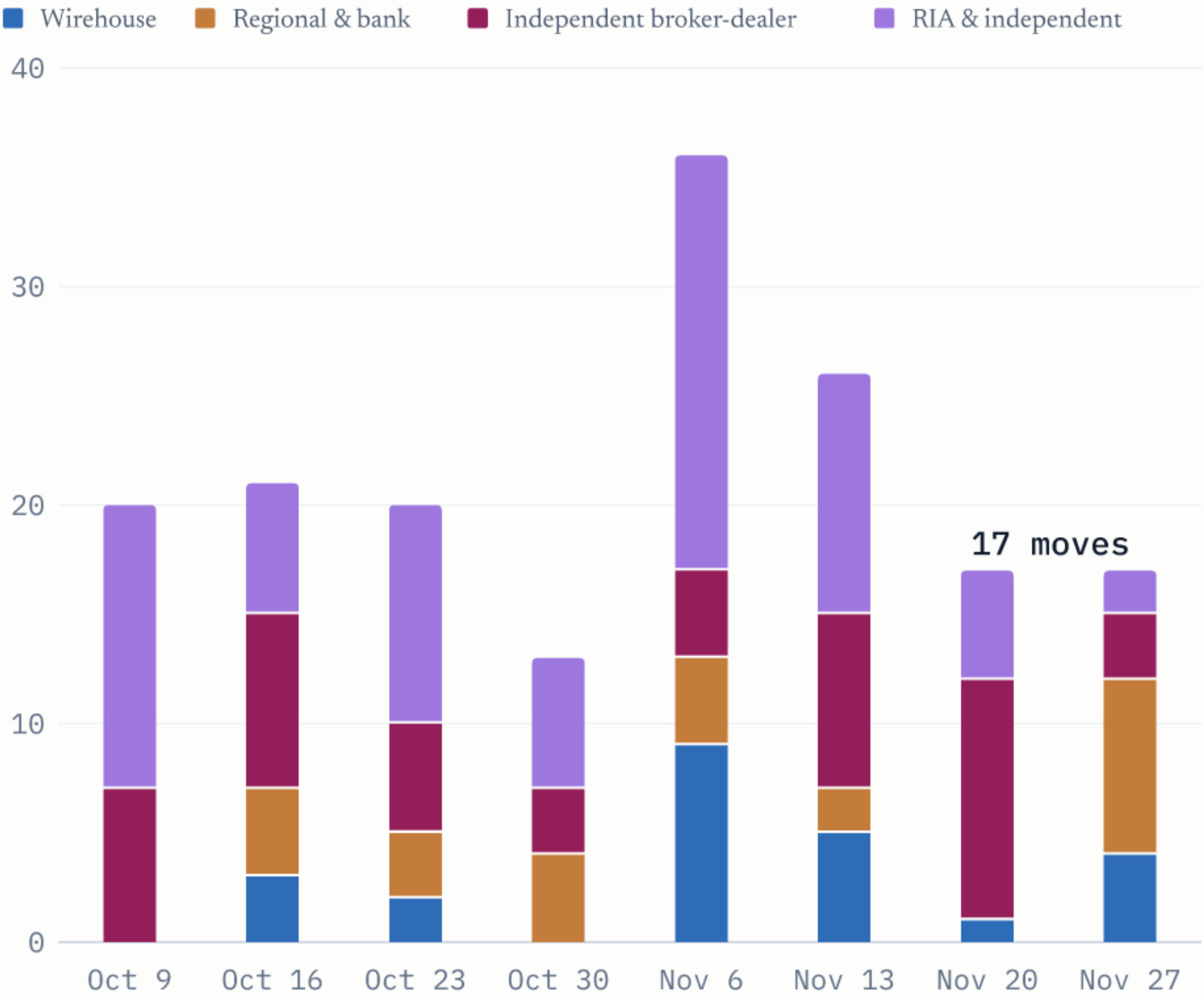
Four weeks of moves with both firms classified



Source: PWD Moves Wire, editor-reviewed · Nov 27, 2026

CHART 2

Advisor moves by destination channel, by week

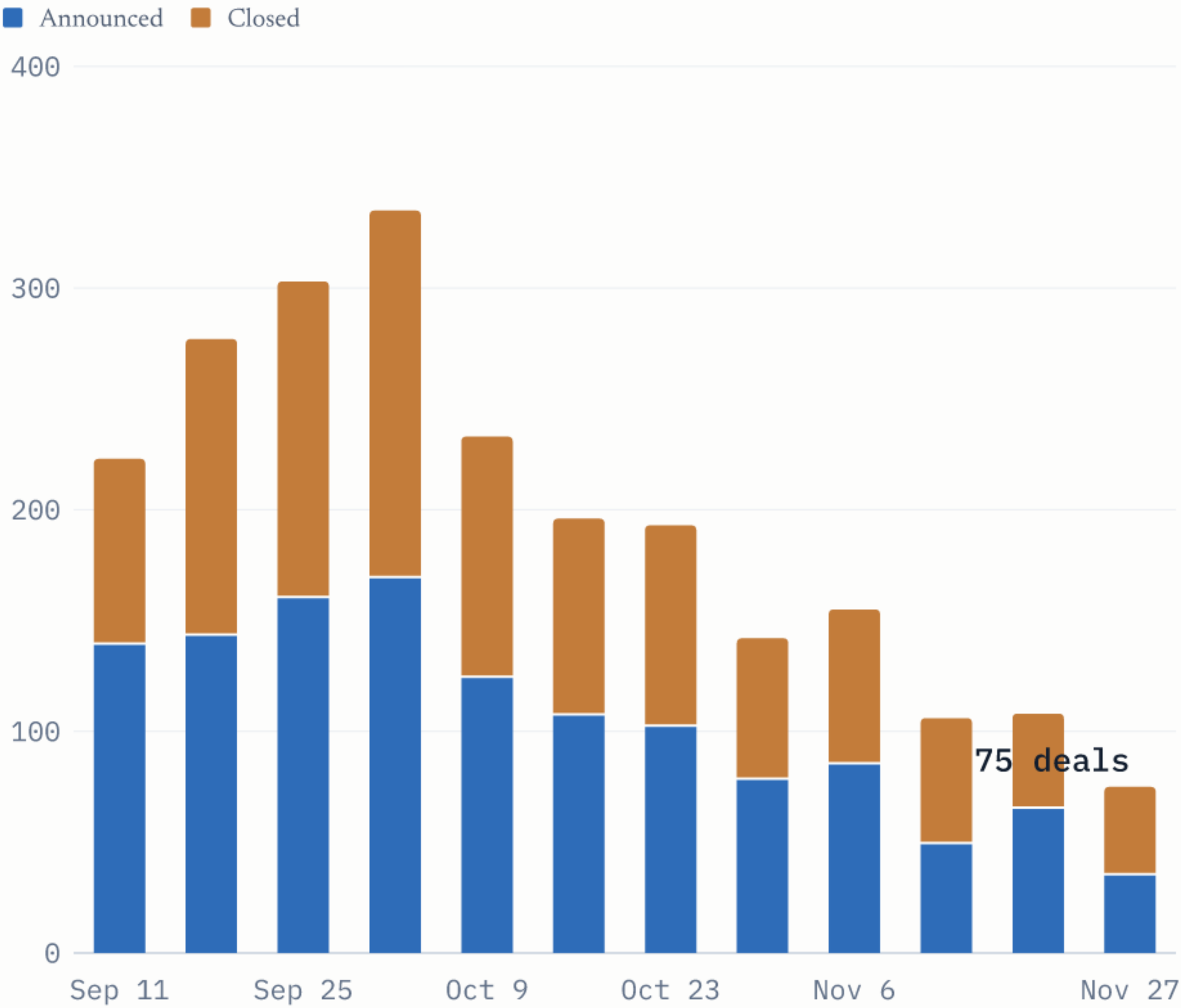


Source: PWD Moves Wire, editor-reviewed · Nov 27, 2026 privatewealthdaily.com

CHART 3

RIA and wealth deals by week

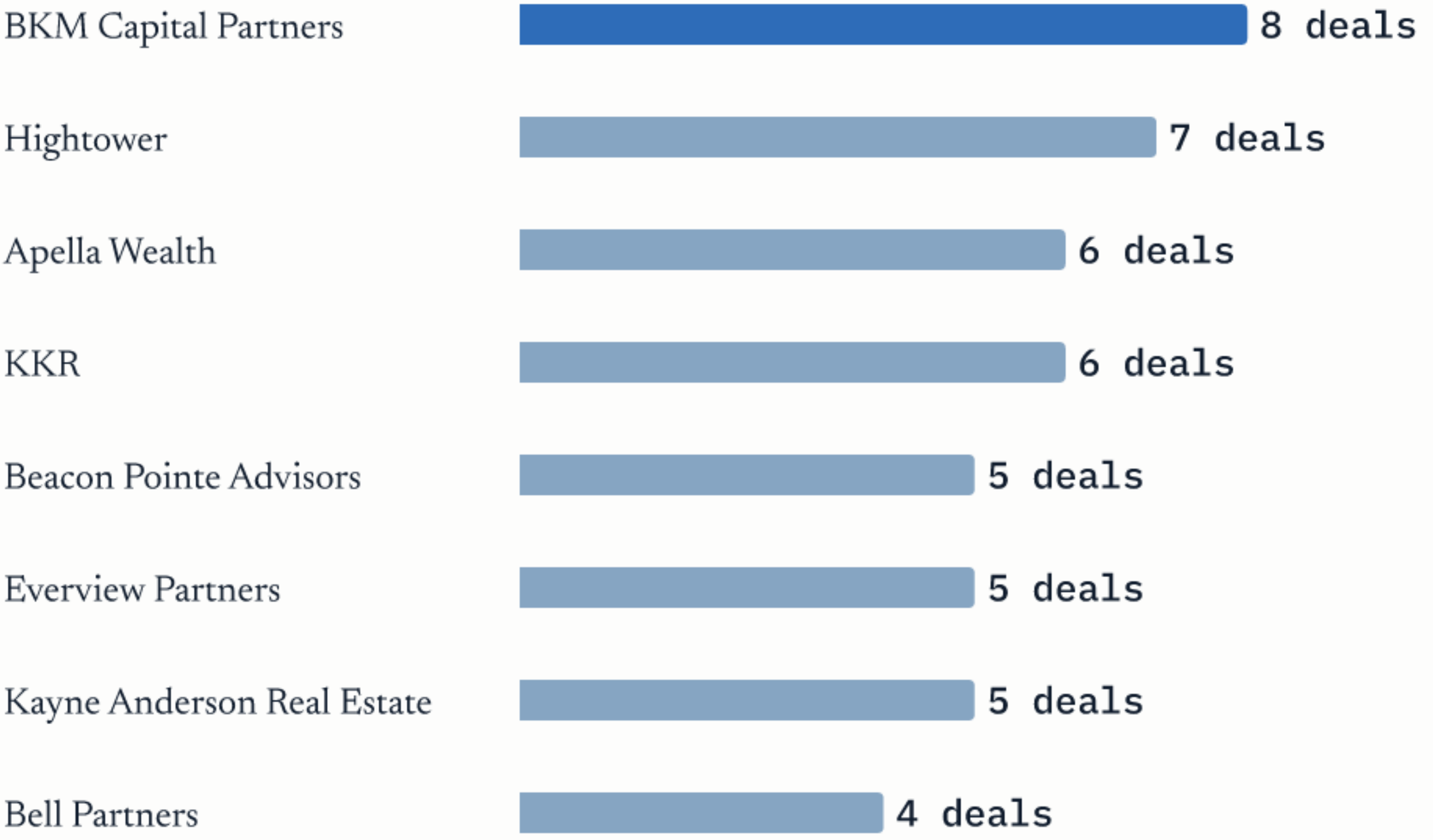
Announced and closed, twelve weeks



Source: PWD deal records from published coverage ·…

CHART 4

Most active acquirers, twelve weeks



Source: PWD deal records from published coverage ·…

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