

THE WEALTH TEAMS & ADVISOR M&A WEEKLY

Week of Oct 26

Truist, U.S. Bank and PNC lost four large advisor teams in four weeks

Citizens Private Wealth added two more bank teams this week, from Comerica Bank and Citi Private Alternatives, as weekly advisor moves fell to 11.



The numbers

Advisor moves, the week

11

▼ -12

8 team moves, 1 breakaway

Reported book in motion

\$3.4B

As reported, for 8 of 11 moves

RIA deals, the week

117

▼ -65.5

Change vs the four-week average

Wirehouse departures to
independence

36.4%

4 of 14 classified, four weeks

CHART 1

Where advisor moves went, by origin channel

Four weeks of moves with both firms classified

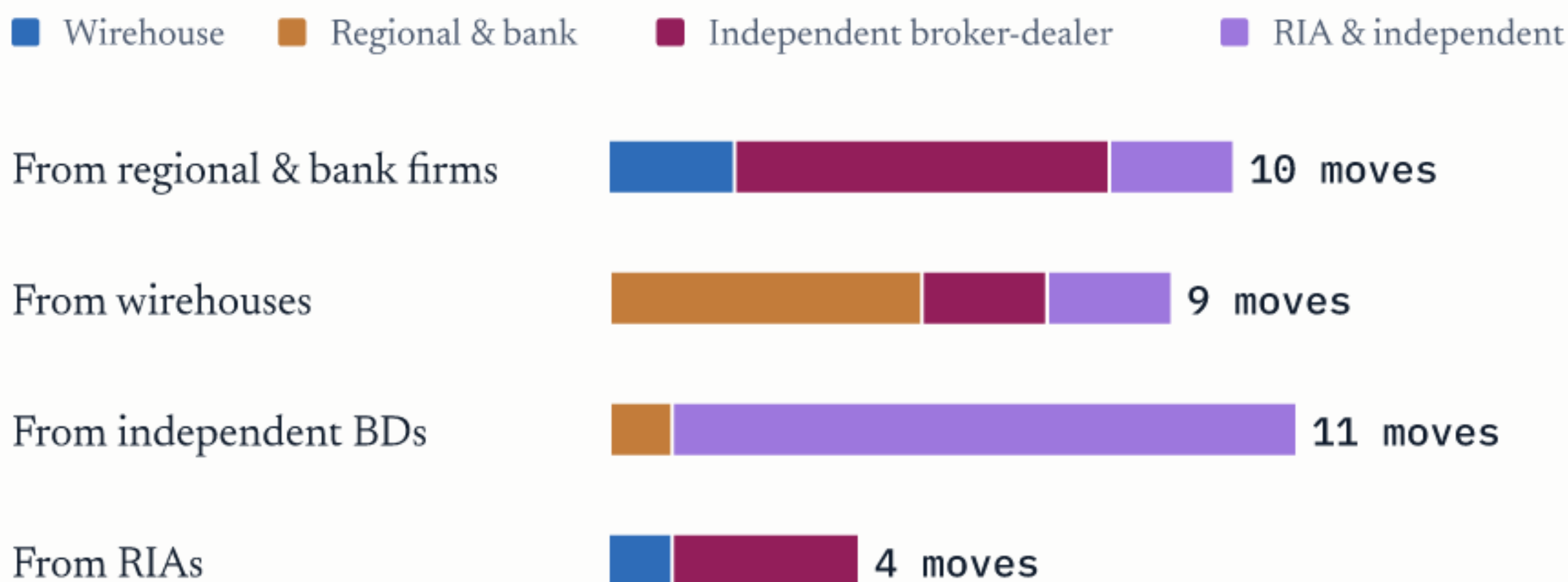


CHART 2

Advisor moves by destination channel, by week

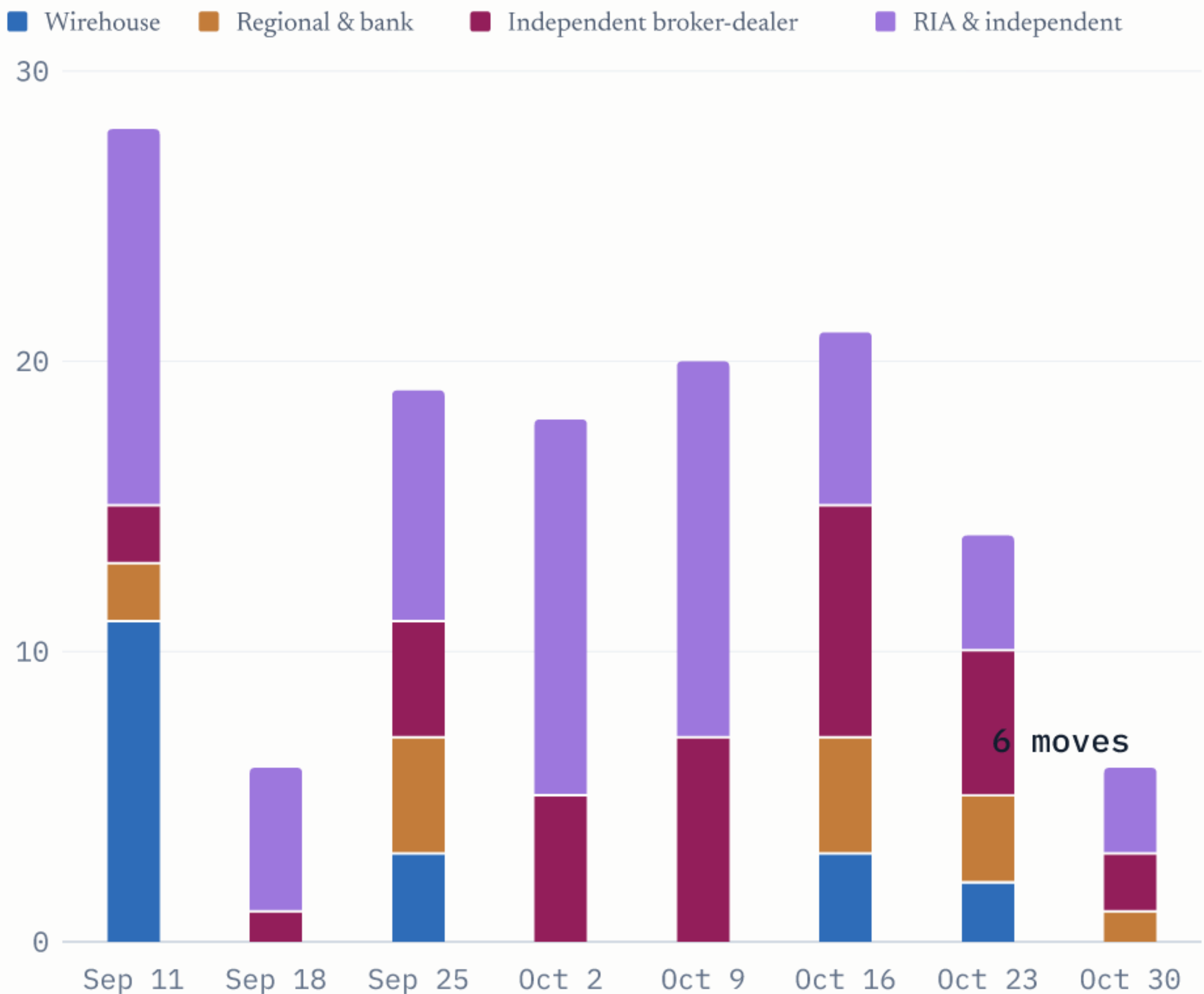


CHART 3

Largest team moves by reported book, four weeks

Book as reported in coverage, not verified

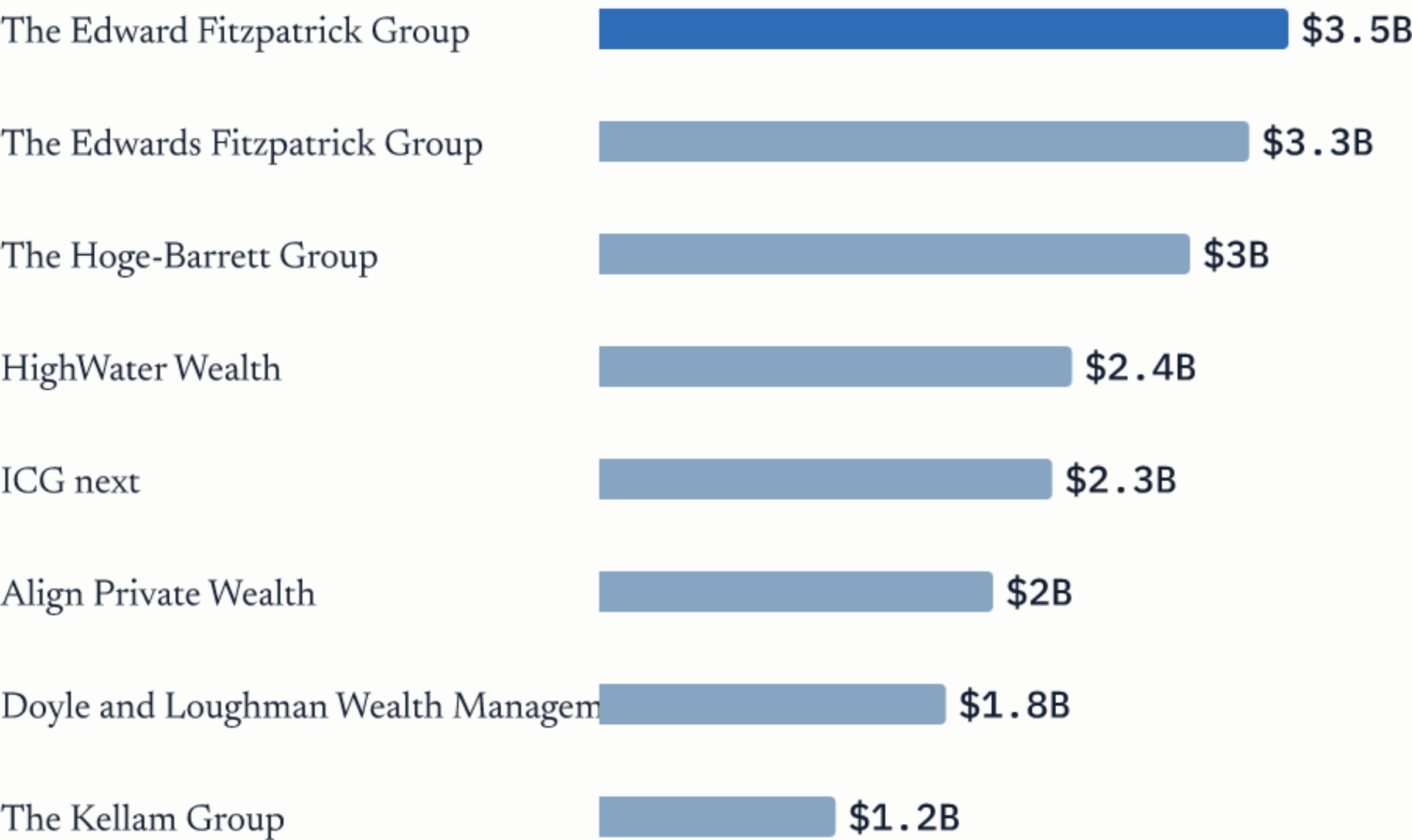


CHART 4

RIA and wealth deals by week

Announced and closed, twelve weeks

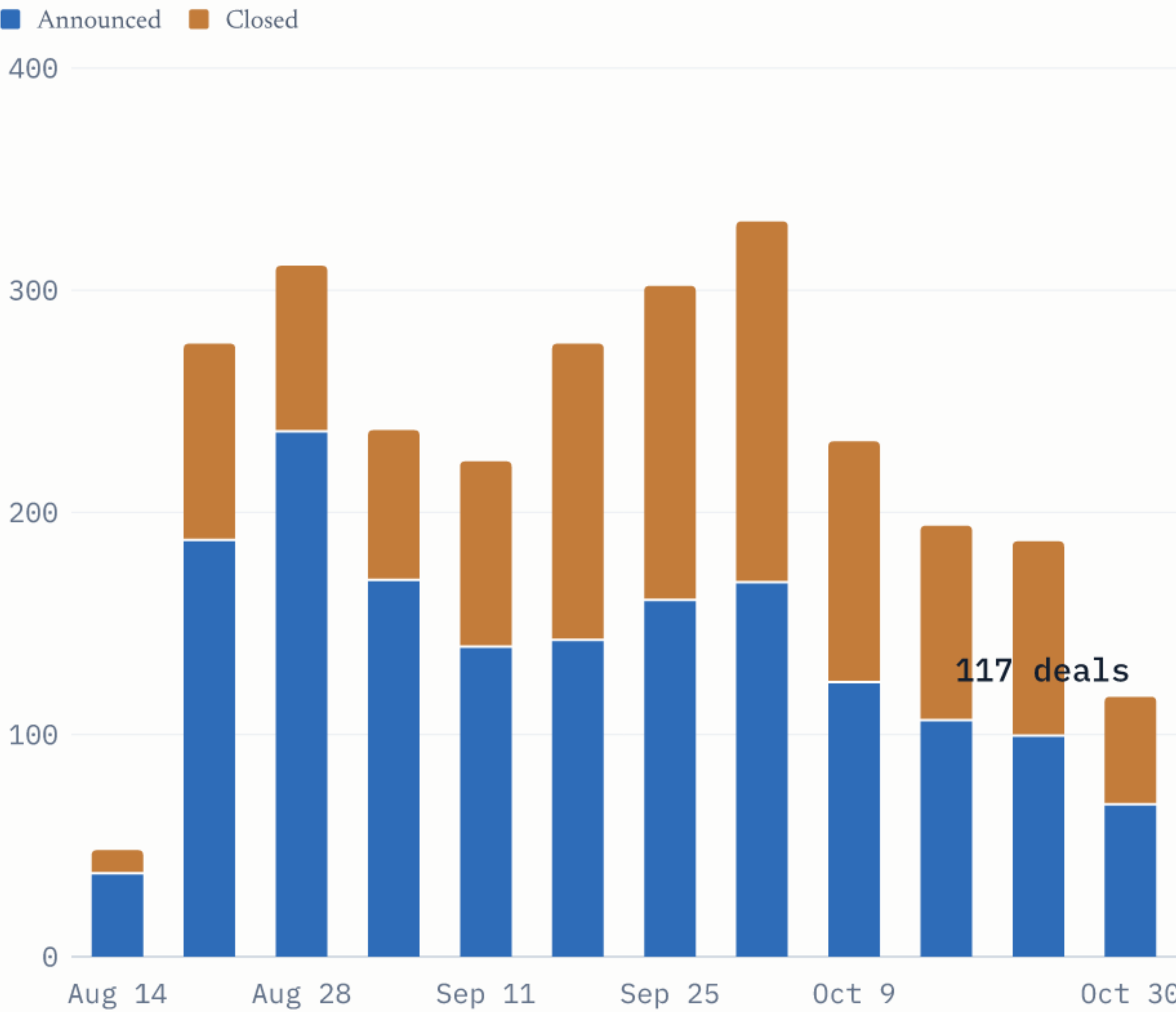
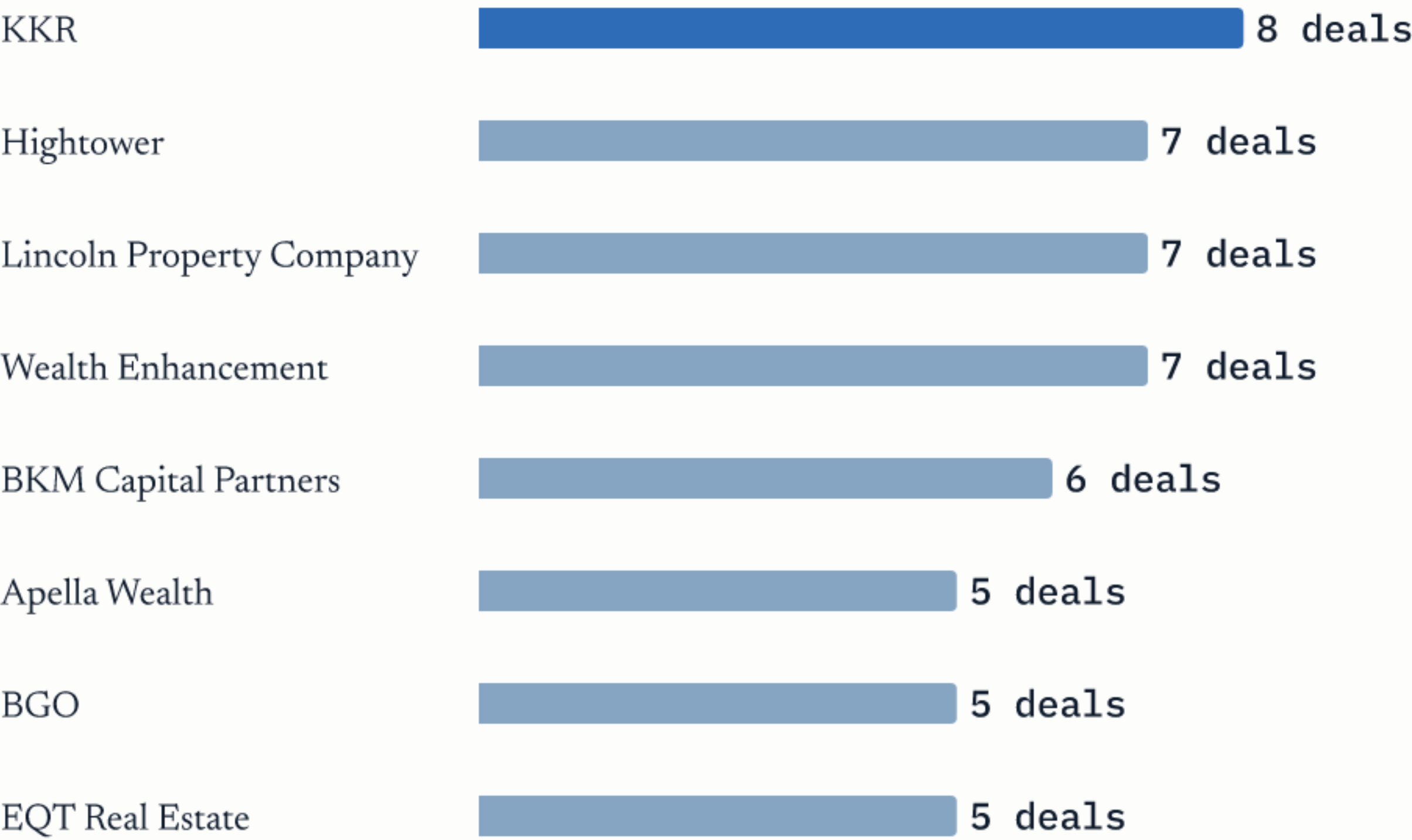


CHART 5

Most active acquirers, twelve weeks



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