Commonwealth Fast Facts

Founded in
1979

2,345
producing advisors[1]

1,243
advisor offices[1]

1,253
home office staff[1]

Located
in Waltham, MA; San Diego, CA; and Blue Ash, OH

Licensed and practicing in
50 states

Business Breakdown[1]

- $2.6 billion in revenue
- $344.4 billion in total account assets
- $218.8 billion in fee-based assets
- $1.16 million—Gross revenue per advisor
- 95.7%—Average payout percentage per advisor
- 2:1 advisor-to-staff ratio
- $200,000—Minimum production requirement

Clearing Services

- Clearing, custody, and other brokerage services provided by Fidelity Investments® through National Financial Services LLC or Fidelity Brokerage Services LLC, Members NYSE, SIPC.[2]

Industry Recognition

- Highest average payout per advisor, as reported by *Financial Planning* in August 2024 IBD Elite special report.[3]
- Ranked highest in gross revenue per advisor among independent broker/dealers, as reported by *Financial Advisor*, April 2025.[4]

Contacts

- **Prospective advisors**, call Becca Hajjar, managing principal, chief business development officer, or Jason Karmelek, VP, head of recruitment strategy, at 866.462.3638.
- **Members of the media**, call Jacquelyn Marchand, senior director, corporate marketing, at 781.736.7980.

[1] *As of 12/31/24*

[2] *Fidelity Investments® is an independent company, unaffiliated with Commonwealth. Fidelity Investments is a service provider to Commonwealth. There is no form of legal partnership, agency affiliation, or similar relationship between your financial advisor and Fidelity Investments, nor is such a relationship created or implied by the information herein. Fidelity Investments has not been involved with the preparation of the content supplied by Commonwealth and does not guarantee, or assume any responsibility for, its content. Fidelity Investments is a registered service mark of FMR LLC. Fidelity Investments provides clearing, custody, or other brokerage services through National Financial Services LLC or Fidelity Brokerage Services LLC, Members NYSE, SIPC. 832059.14.0*

[3] ***2024 IBD Elite Highest in Average Financial Advisor Payout,*** *created by* Financial Planning, *presented in August 2024 and based on data collected during the previous year. Data collected from 41 participating ranked firms. Not indicative of firm's future performance. Your experience may vary. Click here for more award information.*

[4] *Commonwealth ranks highest in gross revenue per advisor among independent broker/dealers, as reported by Financial Advisor Magazine, April 2025. Data is as of December 31, 2024. Not indicative of future performance. Your experience may vary. Click here for more information.*