

Commonwealth Fast Facts



Founded in
1979

100%
owned and controlled
by 11 managing principals



2,077
producing advisors¹

974

home office staff¹



Located
in Waltham, MA, and San Diego, CA



Licensed and practicing in
50 states

Business Breakdown¹

- \$2.0 billion in revenue
- \$272.9 billion in total account assets
- \$174.8 billion in fee-based assets
- \$968,000 – Gross revenue per advisor
- 94.8% - Average payout percentage per advisor
- 2.1:1 advisor-to-staff ratio
- \$200,000 Minimum production requirement

Clearing Services

- Clearing, custody, and other brokerage services provided by Fidelity InstitutionalSM through National Financial Services LLC or Fidelity Brokerage Services LLC, Members NYSE, SIPC.³

Industry Recognition

- Ranked “#1 in independent advisor satisfaction among financial investment firms, eight times in a row” by J.D. Power.²
- Highest advisor overall experience score among the “Big Players” in the independent broker/dealer space, as reported by *Wealth Management* in May 2020.
- Recognized 44 times as one of the Best Places to Work by the *Boston Globe*, *Boston Business Journal*, *San Diego Business Journal*, *U-T (Union-Tribune) San Diego*, and *Computerworld*.

Contacts

- **Prospective advisors**, call Andrew Daniels, managing principal, business development, at 866.462.3638.
- **Members of the media**, call Jacquelyn Marchand, director, corporate communications, at 781.736.7980.

¹As of 12/31/2021

²Commonwealth received the highest score in the independent advisor segment of the J.D. Power 2010, 2012, 2013, 2014, 2018, 2019, 2020, and 2021 Financial Advisor Satisfaction Studies of customers’ satisfaction among financial advisors. Visit jdpower.com/awards.

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