

Tracked Departures

Merrill Lynch	361
Morgan Stanley	155
Wells Fargo (Wirehouse)	141
Wells Fargo FiNet (Independent)	43
Wells Fargo (Bank Channel)	69
UBS	135
Edward Jones	130
J.P. Morgan Securities	31
Truist	23
Ameriprise	20
Raymond James (Employee)	16
Raymond James (Independent)	7
Raymond James (Alex Brown)	4
Stifel Nicolaus	17
Fieldpoint Private	13
RBC	13
LPL	11
U.S. Bancorp	8
Citigroup	8
Janney Montgomery Scott	8
Lincoln Financial Advisors	7
Oppenheimer & Co.	5
Securities America	5
Cantella & Co.	5
Royal Alliance	5
Commonwealth Financial	4
D.A. Davidson	4
MML Investor Services	4
Cetera Advisors	4
Goldman Sachs	4
Triad Advisors	4
Woodbury Financial	4
Steward Partners Global Advisory	3
Cambridge Investment Research	3
First Republic	2
Kestra	2
Fifth Third Securities	2
Northwestern Mutual	2
Kingsview Wealth Management	1
U.S. Capital Advisors	1
Upstream Investment Partners	1
Snowden Lane Partners	1
Other Indep B/Ds & RIAs	54
Total:	1332

Tracked Destination Firms:

Raymond James (Employee)	74
Raymond James (Independent)	102
Raymond James (Alex Brown)	5
Morgan Stanley	157
Wells Fargo (Wirehouse)	76
Wells Fargo FiNet (Independent)	28
Wells Fargo (Bank Channel)	21
LPL (All channels)	102
RBC	86
UBS	81
Ameriprise (Both channels)	61
Stifel Nicolaus (Both channels)	46
Rockefeller Capital Management	41
Kestra Investment Services	41
Sanctuary Securities	35
Janney Montgomery Scott	32
First Republic	25
Commonwealth Financial	23
Merrill Lynch	22
Cetera Advisors	19
NewEdge Wealth	18
J.P. Morgan Securities	16
Steward Partners Global Advisory	9
Sagepoint Financial	8
Arete Wealth Management	8
Robert W. Baird	7
B. Riley Wealth	7
Edward Jones	6
Oppenheimer & Co.	6
Cambridge Investment Research	5
D.A. Davidson	4
Prospera Financial	3
Snowden Lane Partners	3
Truist	3
Concurrent Advisors	3
Wedbush Securities	2
Kingsview Wealth Management	3
Benjamin F. Edwards	2
International Assets Advisory	2
Pruco Securities	1
Stephens	1
Thurston Springer	1
Lincoln Investment	1
Citi Personal Wealth Management	1
U.S. Capital Advisors	1
Upstream Investment Partners	1

U.S. Bancorp	1
Western International Securities	1
Woodbury Financial	1
BNY Mellon-Pershing	1
Northwestern Mutual	1
Other Indep B/Ds & RIAs	132