

Atria Wealth Solutions Buys Broker-Dealer with \$11 Billion AUA

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Atria Wealth Solutions Inc., a wealth management holding company, has closed the acquisition of Western International Securities Inc, an independent broker-dealer based in Pasadena, California with more than 400 independent financial advisors with \$11 billion of assets under administration.

With the close of the transaction, Atria now serves nearly 2,500 advisors with approximately \$75 billion of AUA across five broker-dealers.

“The strategic acquisition of [Western International Securities] expands the set of affiliation models available to independent advisors to now include a turnkey branch solution,” the company said. “For advisors seeking a seamless transition to independence, the turnkey solution alleviates the burdens associated with procuring office space, choosing critical infrastructure, integrating technology and hiring staff.”



Western International Securities is the fifth broker-dealer acquired by Atria since 2017. Atria serves the investment programs of credit unions and banks through its subsidiaries, CUSO Financial Services and Sorrento Pacific Financial, and independent advisors through its subsidiaries, Cadaret, Grant & Co., NEXT Financial Group, and Western International Securities.

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