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**Sowell Management Expands Nationwide Advisor Footprint**

Growing RIA tuck in adds 8 new IARs and 2 new RIAs since Q4 2022

**North Little Rock, AR –** (BUSINESS WIRE) – Sowell Management, a privately held Registered Investment Advisor (RIA), announced today the recent addition of eight new Investment Advisor Representatives (IARs) and two new RIAs to their platform that allows financial advisors to operate independently.

Sowell Management was profiled by Forbes in 2022 as one of [America’s Top RIA Firms](https://www.forbes.com/lists/top-ria-firms/?sh=1a7adadb3cd5) and currently serves over 100 IARs and 20 RIAs with more than $4 billion (AUM/AUA)\*, according to Bill Sowell, the company’s founder and CEO. “The new additions are in Arkansas, Colorado, Maryland, New York, Oklahoma, Pennsylvania and Texas,” Sowell said.

“Sowell Management is different from most of our competitors in that we count IARs and RIAs as clients,” said Jason Inglis, Sowell’s chief revenue officer. “The addition of these new advisors and RIAs – and the caliber of their people – is powerful. It emphasizes that in a time when the financial industry is being challenged, Sowell continues to grow,” Inglis added.

There are a myriad of [reasons advisors choose independence,](https://www.sowellmanagement.com/why-financial-advisors-choose-independence-an-insiders-view/) and specifically Sowell Management, and their reasons vary Sowell said. Stephen Carter, Weaver Capital Advisors’ partner, who works with high-net-worth individuals and their families said, “We were looking for a partner to support asset management and offer a platform and team to help us launch our practice. Their partnership has helped guide us and removed some of the burdens of opening a practice – allowing us to focus on growing and expanding our client base.”

Daryl Seaton, Sowell Management’s president, said the company has benefited greatly from their flexibility as well as the trend of advisor flight to the RIA space. “Our FLEX Connect platform, a purpose-built, end-to-end solution designed to empower advisors through every stage of the wealth management life cycle, was built for affiliated IARs, however, we have the technology, expertise and people to use what we have built to service unaffiliated RIAs as well.”

* more -

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The fact thatSowell continues to expand is no surprise to Tim Poole, a Hot Springs, Arkansas-based financial advisor who owns APEX Asset Advisors and has been affiliated with Sowell for several years. “Since day one, they have supported the growth of my business. Their team handles operational activities like account opening and billing and provides portfolio and investment advice,” he said.

“A couple of years ago, APEX needed a fresh look, and Sowell’s marketing department created our new brand, including our website. They have also helped with social media and lead generation. Because of Sowell, I’m able to spend more time in front of my current clients and meeting new ones,” he said.

Bill Sowell said the reason advisors embrace Sowell Management, and the explanation for the recent growth, is the same. “We meet advisors where they are, whether that’s breaking away and becoming independent, looking to grow or even providing succession planning when they’re ready to move on to what’s next. We are in the relationship business, really. We have services we offer, but first and foremost, we build partnerships that are based on trust and develop over time. That’s really been the secret to our growth.” he said.

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**About Sowell Management**

[Sowell Management](http://www.sowellmanagement.com/) is a privately held Registered Investment Advisor (RIA) and a trusted partner to financial advisors. They are a Forbes and Barrons\* top 100 RIA and were founded in 2001 on the principles of fee-based fiduciary investing. Sowell Management provides a platform of services and solutions that leads advisors on the path of independence – including leading technology and portfolio management – helping advisors be in business for themselves, not by themselves. Sowell considers itself "the advisors to advisors," offering a diversity of services and a nationwide client base, with $4 billion in AUM/AUA as of April 2023. Sowell Management – there for the advisors; there for the journey.

\* Regulatory assets under management (AUM) are assets where Sowell provides continuous and regular supervisory or management services to client portfolios. Assets under administration (AUA) is a measure of the total assets for which Sowell provides administrative services. *Third-party rankings and recognition from rating services or publications are no guarantee of future investment success. Working with a highly rated advisor does not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor or by any client, nor are they representative of any one client’s evaluation. Generally, rankings and recognition are based on information prepared and submitted by the advisor. No fee was paid for consideration of this award and consideration for the Forbes 2022 Top 100 RIAs was conducted by interview on June 29, 2022. The report was published in October, 2022.*