



CAREERS at PER STIRLING

OVERVIEW

Per Stirling is an award-winning, Texas-based RIA that has been selected by InvestmentNews as one of The Best Places in America to Work for Financial Advisors. While only 46 firms in the country have been selected for this honor more than once, Per Stirling has been recognized for this honor in each of the past five years.

Per Stirling was also selected by the Financial Times in both 2019 and 2020 (the last two years of the ranking) as one of the 300 top RIAs in America (one of only 15 Texas-based firms to be recognized as such).

Our goal is to provide advisors with virtually all of the benefits of owning their own RIA, but with better profitability and without the many headaches. Many advisors have found value in this business model, and Per Stirling has twice, over the past five years, been recognized by Financial Advisor Magazine as one of the four fastest growing RIAs in America. Much of this growth is attributable to owners of six different RIA firms deciding to improve both their profitability and their work/life balance by joining the Per Stirling team.



BENEFITS & ADVANTAGES

Per Stirling Partner-Level Advisors Benefit From:

- Being featured as a Partner in the firm
- Payouts of 73% to 76% of revenues
- A seat on the Partners Board and a voice in important company-related decisions
- Distributions via corporate profit-sharing

All Per Stirling Advisors Benefit From:

- An average payout of 71% of revenues (minimum of 65%)
- Support from an Operations Specialist
- Opportunities for equity ownership
- A dedicated firm social media presence, including a blog with advisor-submitted articles
- A Broker-Protocol firm and an experienced transition team
- An independent, hybrid and multi-custodial platform with a strong compliance infrastructure
- A very advisor-friendly contract that makes it clear that each advisor “owns” their own book
- A fun, collaborative environment, and an opportunity to join a highly-skilled fiduciary team
- A company committed to technology and cyber-security
- Opportunities for client referrals through the firm’s solicitors and through company-level marketing
- Access to group health, dental and vision benefits, including family plans

We have two locations in Austin and one in Dallas, and are very interested in adding offices in Houston and San Antonio. We seek to add both advisors and advisor teams in all four cities.

To learn more about career opportunities, please visit us at perstirling.com/careers

AWARDS & RECOGNITION

2017 - 2019

- Austin Business Journal selected Per Stirling as one of the Best Places in Austin to Work.

2018

- InvestmentNews recognized Per Stirling as the 17th best Financial Firm in America to work with, and 11th best among smaller firms.
- Financial Advisor Magazine recognized Per Stirling as the 3rd fastest-growing Registered Investment Advisory firm in the country (for RIAs with at least \$250 million of AUM).
- Per Stirling won the Ethics in Business and Community Award.

2019

- InvestmentNews recognized Per Stirling as the 19th best Financial Firm in America to work with, and 3rd best among mid-sized firms.
- Selected by the Financial Times as one of the 300 top Registered Investment Advisors in America (one of only 15 Texas firms to be selected).

2020

- InvestmentNews recognized Per Stirling as the 5th-best, mid-sized financial services firm in America for advisors to work with, and as one of only 46 firms in the country that have been selected for this honor more than once. Per Stirling has been selected as a top firm in all three years of the survey's history.

2020 (Continued)

- Austin Business Journal selected Per Stirling as one of the Best Places in Austin to Work.
- Per Stirling was selected, for a second year in a row, by the Financial Times as one of the 300 best Registered Investment Advisors in America (one of only 15 Texas-based firms to be recognized).

2021

- InvestmentNews recognized Per Stirling as one of the 75 Best Places to Work for Financial Advisers nationwide for the 4th year in a row.

2022

- For the 5th year in a row, Per Stirling has been named as one of the Best Places in America to Work for Financial Advisors (by InvestmentNews Magazine). We are only one of approximately 50 firms to receive this national honor multiple times.
- For the fifth time in the past six years, the Austin Business Journal recognized Per Stirling as "One of the Best Places in Austin to Work."
- Financial Advisor Magazine has recognized Per Stirling as one of America's top RIAs.



Join an organization of professionals, who are highly-regarded for their acumen and expertise, and a team regularly quoted in major national and international media outlets including, as examples:

Barrons

Fortune Magazine

CFO Magazine

Reuters UK

The New York Times

The Wall Street Journal

US News and World Report

On Wall Street

The BBC

Reuters

CNBC.com

NASDAQ.com

Fox Business News

Business Insider

Financial Planning Magazine

finance.yahoo.com

Per Stirling Headquarters
4800 Bee Caves Road
West Lake Hills, Texas 78746
512.628.2300

Per Stirling North Austin
4900 Spicewood Springs Road
Suite 300
Austin, Texas 78759
512.527.8411

Per Stirling Dallas
17304 Preston Road
Suite 205
Dallas, Texas 75252
972.848.3325

www.perstirling.com/careers

*For more information on the selection criteria for these awards, please visit perstirling.com/disclosures.

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Per Stirling Capital Management, LLC, and B. B. Graham & Co., Inc., are separate and otherwise unrelated companies.