



**WE EXIST TO EMPOWER
FINANCIAL PROFESSIONALS.**

About Concorde

With a personalized approach, Concorde offers a high-caliber experience tailored to each advisor's and client's unique goals. The firm's integrated broker-dealer and wealth management platforms are designed to maximize potential, providing customized support and forward-looking resources that allow financial professionals unlock their full potential.

Recognizing that investors often require a diverse range of financial solutions, we have established an integrated ecosystem of specialized business entities:

CONCORDE INVESTMENT SERVICES

As an independent broker-dealer with a boutique approach, Concorde Investment Services delivers flexible service models tailored to suit unique business requirements. While we specialize in alternative investments, we also offer a comprehensive suite of broker-dealer investment products.

CONCORDE ASSET MANAGEMENT

Our full-service registered investment advisor (RIA) provides robust support through a dedicated team, advanced practice management and financial planning tools, access to third-party asset managers and sub-advisors, and a wide array of portfolio management resources.

CONCORDE INSURANCE AGENCY

Through our strategic partnership with Alpine Brokerage Services, Concorde Insurance Agency offers national coverage and access to over 100 insurance carriers. We also provide personalized concept training and point-of-sale support to enhance your client engagement capabilities.



Concorde Core Values

WE CARE

We prioritize empathy, respect and proactive support – demonstrating genuine care in every interaction with our team and our partners.

DELIVER AN AMAZING EXPERIENCE

We foster a culture of collaboration and respect by prioritizing proactive support, clear communication and personalized solutions to ensure every interaction is aimed at excellence.

MAXIMIZE POTENTIAL

We empower growth by embracing new ideas, sharing knowledge and providing innovative tools and guidance to help financial professionals unlock their full potential.

NURTURE LONG-TERM RELATIONSHIPS

We build lasting relationships by offering unwavering support, understanding individual needs and fostering trust through consistent, meaningful interactions with our representatives.

ENCOURAGE FORWARD THINKING

We embrace innovation, encourage fresh ideas and collaborate to deliver forward-thinking solutions that drive growth and evolve with the needs of our team and clients.



About Concorde

Concorde is a nationally recognized, full-service broker-dealer and SEC-Registered Investment Advisor (RIA) and insurance firm committed to supporting financial professionals and their clients. Through a thoughtfully integrated ecosystem of investment, advisory and insurance solutions, the firm provides the tools and expertise needed to help reach financial goals and objectives. Founded by entrepreneurs, the Concorde team is proud to serve a company made up of like-minded individuals driven by passion, purpose and a shared commitment to excellence.

Headquartered in Michigan, Concorde Holdings, Inc. is the parent company of Concorde Investment Services, Concorde Asset Management and Concorde Insurance Agency. The firm serves clients across all 50 states with a clear focus on long-term partnership and purposeful progress.

Securities offered through Concorde Investment Services, LLC, member FINRA/SIPC. Advisor services offered through Concorde Asset Management, LLC, an SEC-registered investment advisor. Insurance offered through Concorde Insurance Agency, Inc.

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