



IBD/RIA FACT SHEET



B/D (or RIA) name: Cantella & Co., Inc.

Address: 101 Federal St, 13th Floor, Boston, MA 02110

Phone: (800) 333-3502

Business development contacts: Jim Freeman or Todd Micklovich

Web link: <https://www.cantella.com/>

Number of back-office employees: 35

Number of financial advisors: 215

Total client assets under management: \$6.5 billion

Average payout per rep (percent): 90%

About the Company:

Cantella is the ideal home for entrepreneurial representatives who need the latest in technology to help them work smart, yet value a personalized approach from the home office to support their business. We are large enough to offer everything a rep needs such as the ability to carry accounts at three different NYSE member firms, yet small enough that we know each representative personally when they call us. If you want to call the CEO or President directly, go ahead, as we do not screen calls. Many departments do not even have voice mail as we know certain tasks need to be addressed immediately.

Cantella is a family owned firm that has been helping investors and financial consultants since 1952. Our representatives become part of our family. We keep the formula simple; if you are a solid producer, you receive a 90% payout from dollar one without many of the nickel and dime fees you will find at other independent firms. Yes, there are ticket charges, but if you manage your expenses, most wirehouse representatives find a significant improvement in their retention percentage. We are here to

help you.

If you would like to receive a free copy of the book, *Going Independent*, please visit <https://www.cantella.com/> or call Jim Freeman or Todd Micklovich at (800) 333-3502.