



**FOR IMMEDIATE RELEASE**

**Contact:** Jim Townsend@  
205.414.3314  
[jtownsend@sterneagee.com](mailto:jtownsend@sterneagee.com)

## **Meg Green & Associates Affiliates with Sterne Agee to Support Growth Initiatives & Enhance Client Services**

*Highly Respected Wealth Management Firm Selects Sterne Agee's Independent Broker/Dealer & RIA Custody Platform*

**Birmingham, Alabama and Miami, Florida** – Sterne, Agee & Leach, Inc., one of the oldest and largest privately-owned brokerage firms in the country, today announced that Meg Green & Associates has signed a definitive agreement with Sterne Agee Financial Services to support their hybrid investment model.

Meg Green & Associates is one of the leading independent wealth management firms in South Florida. Their firm offers a multi-generational approach to more than 300 affluent families and small business owners, managing over \$650 million in client assets. Founded in 1984 in Florida, the firm is known for customer loyalty and client retention, having one of the highest retention rates in the industry.

Named by Barron's as one of "America's Top 100 Women Financial Advisors" five years running, Meg Green, CEO of Meg Green & Associates, along with her partner of 10 years, Todd Battaglia, selected Sterne Agee, in part to access its extensive financial resources. This includes brokerage, custody and advisory services, technology, research, banking and trust services. They also did it to maintain their independent brand.

"After an extensive search for a suitable financial affiliate, Sterne Agee emerged as the ideal fit for us because of their willingness and ability to create a custom platform to meet our client needs and most importantly, to allow us to remain independent," said Green. "Having the ability to act as both advisor and broker gives us ultimate flexibility to serve our clients' needs."

"As one of the country's most well respected and successful wealth management firms, we are thrilled that Meg and Todd selected our firm to create a truly customized Hybrid RIA platform for their firm. Meg Green & Associates' philosophy and business model are well aligned with the strengths and direction of our firm," said Jay W. Carter, President and CEO of Sterne Agee Financial Services. "This association with their practice will empower both of our firms to achieve higher levels of success. They are astute business people and true visionaries."



**About Meg Green & Associates** - Meg Green & Associates is a highly respected wealth management firm, well known throughout the financial services industry. Founded in South Florida 28 years ago, their team works to serve the needs of their clients in a multitude of ways, above and beyond managing investments. “We take care of the wealthy, not just their wealth”. Their investment advisory services are offered through Meg Green & Associates, Inc., a registered investment advisor not affiliated with Sterne Agee Financial Services. For more information visit [www.meggreen.com](http://www.meggreen.com).

**About Sterne Agee**-Founded in 1901, Sterne Agee is one of the oldest and largest privately-owned investment banking firms in the country employing nearly 1,300 employees in 50 offices in 22 states. Sterne Agee is the trade name used by certain affiliates of Sterne Agee Group, Inc. including Sterne Agee Financial Services, Inc., Member FINRA/SIPC. Sterne Agee Financial Services, Inc. is a registered broker-dealer serving independent representatives, financial institutions and custody services for RIA firms. For more information, visit [www.sterneagee.com](http://www.sterneagee.com).

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