

Chicago Partners | Wealth Advisors

A History of Compounding Trust

Where We Came From

In 2002, PricewaterhouseCoopers recruited managing partner Jim Hagedorn to lead its Midwest wealth management program. There, Jim and Anthony Halpin built investment portfolios for PwC's executive teams, pairing them with strategic tax planning. When PwC exited the business in 2007, the two arranged an amicable spin-off, and they maintain a strong relationship with PwC today.

In 2008, Jim and Anthony founded Chicago Partners with 100 clients, a four-person office, and \$300 million under management. Since then, the firm has grown through ten tuck-in acquisitions of complementary firms, including Mark and Dan Toledo's Total Portfolio Management in 2013. Each has expanded the firm's capabilities, united by a common investment philosophy and a shared dedication to client service.

Today, Chicago Partners advises investors across six states and abroad and remains guided by its original mission: to serve clients with distinction. In 2026, the firm was named to Barron's list of the Top 100 RIA Firms. The firm is also a member of the Schwab Advisor Network®, acting as one of approximately 115 chosen firms in the network out of roughly 16,000 RIAs that use Schwab for custody.

At Founding - 2008

\$300MM under management

100 clients

4 people, one office

Today - 2026

\$8.8B under management

3,100+ investors advised

50+ professionals, six states



\$8.8B

Assets under management



3,100+

Investors advised



6 States

IL (HQ), CA, FL, HI, MT, NY



18 Years

A fiduciary since 2008

Credentials on Staff

12 Certified Financial Planners (CFP®)

10 Chartered Financial Analysts (CFA)

4 Chartered Alternative Investment Analysts (CAIA)

4 Licensed Attorneys (J.D.)

Held to the Fiduciary Standard since 2008 — always acting in your best interest first.