



Jamie Price

President and CEO

Jamie Price is President and CEO of Osaic, one of the nation's largest providers of wealth management solutions, overseeing approximately \$705 billion in client assets. He is responsible for the management of more than 2,500 employees who serve the needs of the firm's approximately 11,000 financial professionals. He is also a member of the Osaic Board of Directors.

Career Summary

Jamie has led Osaic since shortly after its separation from AIG in 2016. Since then, he has firmly established the company in a leadership role among its peers, driven by his dedication to drive profitable growth for advisors. The 2021IBD Elite Survey rankings listed Osaic among its peers as #1 in Highest Growth in Producing Advisors, #2 in Most Fee-Based Assets, and #3 in Total Revenue. He has also led four major acquisitions in his term, retaining virtually all of their advisors and exceeding consolidation goals.

These achievements stem from Jamie's passion for strategy, technology, talent, and service. He has invested in the development of executives, line managers, and employees as a cornerstone of the business growth strategy. He endorsed the Parity Pledge commitment for female hiring. He has championed the formation of multiple advisory boards of affiliated financial professionals at each of the company's six wealth management firms to ensure more open lines of communication and at the enterprise level. Internally, he promoted the establishment of a similar 22-person employee engagement group and 24-person Senior Leader Council.

Securities and investment advisory services are offered through the firms: Osaic Wealth, Inc. and Osaic Institutions, Inc., broker-dealers, registered investment advisers, and members of FINRA and SIPC. Securities are offered through Ladenburg Thalmann & Co., broker-dealer and member of FINRA and SIPC. Advisory services are offered through Ladenburg Thalmann Asset Management, Inc., and Osaic Advisory Services, LLC., registered investment advisers. Advisory programs offered by Osaic Wealth, Inc. are sponsored by VISION2020 Wealth Management Corp., an affiliated registered investment adviser.



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Career Summary (continued)

Under Jamie's leadership, Osaic has made strategic investments to ease the regulatory and business operational aspects of its financial professionals: business consulting and succession planning services, cyber security protections, marketing services, and major technology enhancements for both internal and client-facing applications.

Before leading Osaic, Jamie invested in and helped lead the startup 1-800 DOCTORS, a concierge service that connects patients with medical professionals. Earlier, as Head of Wealth Management Advisor Group Americas at UBS, Jamie was responsible for its North American client-facing businesses and driving advisor productivity to #1 in the industry. As President & COO of Prudential Securities, he led the firm to its highest JD Power & Associates national broker-dealer client satisfaction ranking. He started his career as a management training associate at EF Hutton.

Jamie attended the Charles H. Lundquist College of Business at the University of Oregon, where he earned a Bachelor of Science degree in Finance and Economics. He has earned the Securities Institute Association's Certificate from The Wharton School, and holds Series 7, 24 and 63 FINRA securities licenses.

Jamie sits on the boards of the Securities, Investment, and Financial Markets Association (SIFMA), and was recently the 2024 Chair of Financial Services Institute (FSI). He has served on the boards of the Invest in Others charitable foundation, Big Brothers Big Sisters of New York City, the Boston Symphony Orchestra, and on the Metropolitan Museum of Art's Business Committee.

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