

For Immediate Release

Beyond the Portfolio: Modern American Advisor Reimagines Financial Media

Think GQ or Vogue for financial media: Modern American Advisor brings a premium editorial lens to business, leadership, culture and experiences, reflecting the full lives of the people behind financial advice.

NEW YORK, Sept 2, 2026 — Modern American Advisor today formally introduced its broader vision as a premium U.S. media, intelligence and influence platform created for the advisors, firms and organizations shaping the future of financial advice.

Launched in March 2026, Modern American Advisor is built around a distinct premise: the financial services industry provides extensive information about markets, investments and managing client wealth, but far less attention is given to the business responsible for delivering that advice or to the broader interests of the people building those businesses.

While traditional financial media has largely treated advisors as professionals consuming market news, industry statistics and investment intelligence, Modern American Advisor takes a broader view. The company sees advisors as consumers of media whose interests extend across business, leadership, technology, culture, professional development and experiences.

Modern American Advisor combines the rigor and relevance of financial journalism with the broader perspective of premium consumer publishing, recognizing that advisors' interests and influence extend well beyond their profession.

As advisory firms confront consolidation, succession, artificial intelligence, talent competition and changing client expectations, their success will increasingly depend on more than investment performance. It will depend on how effectively they grow, lead, operate and build long-term enterprise value.

"Financial advice is changing, but much of the media serving the industry still begins and ends with markets, products and assets," said **Alex Sullivan, Founder and CEO of Modern American Advisor**. "We created Modern American Advisor to examine the broader picture: the people building these firms, the business decisions shaping them and the ideas, resources and experiences influencing what comes next."

A Modern Platform for a Changing Industry

Modern American Advisor combines original journalism, premium publishing, audience intelligence and multimedia programming within one connected platform.

The platform draws on a deep bench of experienced financial writers, editors and industry specialists, bringing subject-matter expertise and editorial depth to its coverage of advisory businesses and the people behind them.

Its work spans print and digital journalism, newsletters, podcasts, video, webinars, original research, executive interviews and live experiences. The company serves financial advisors and wealth management leaders as well as the asset managers, technology companies, custodians, platforms and professional services firms seeking to engage them.

Rather than treating each channel as an isolated media product, Modern American Advisor develops content and campaigns around the audience, the subject and the larger commercial objective.

For advisors, that means access to relevant reporting, perspectives and resources about the forces affecting their firms and the profession, alongside broader coverage of leadership, technology, professional development, culture and experiences relevant to their lives as business leaders and consumers.

For organizations serving the advisory market, it creates a more informed way to build credibility and engage the firms, roles and decision-makers most relevant to their businesses.

“Reach matters, but relevance matters more,” said **Kathryn Ficarra, SVP of Brand and Strategic Partnerships at Modern American Advisor**. “Our opportunity is to bring strong editorial, better audience intelligence and thoughtful distribution together so the work is useful to the advisor and valuable to the organizations trying to reach them.”

Build to a Billion

At the center of Modern American Advisor’s editorial and intelligence strategy is **Build to a Billion**, its flagship platform focused on the business behind financial advice.

Build to a Billion examines how advisory firms grow, scale and build enduring enterprise value. The name is not defined by a literal \$1 billion asset threshold. It represents the ambition, infrastructure and discipline required to build a firm capable of supporting its next stage of growth.

The platform focuses on four core areas:

Advisor growth and performance, including organic growth, client acquisition, advisor communication, talent, succession and enterprise value

Leadership and professional development, focused on leadership development, professional visibility, communication, advancement, retention and influence

Vertical-specific intelligence, examining the distinct challenges affecting RIAs, wealth teams, family offices and the organizations serving them

AI solutions and adoption, providing practical intelligence about how advisory firms can evaluate and use artificial intelligence across productivity, operations, decision-making and the client experience

Build to a Billion will explore these subjects through reporting, executive interviews, assessments, research, podcasts, video, webinars and live conversations.

“Managing client wealth is one discipline. Building a valuable and resilient advisory business requires another,” Sullivan said. “Build to a Billion gives us a platform for examining the capabilities that determine whether a successful practice can become an enduring enterprise.”

Connecting Intelligence With Action

Modern American Advisor owns and directs Build to a Billion’s editorial, intelligence and audience strategy.

Through carefully selected strategic partnerships, the platform can also connect firms with specialized expertise and capabilities aligned with the business challenges it covers. Strategic partners remain independent organizations, with select offerings brought to market in collaboration with Modern American Advisor.

This structure allows MAA to maintain a clear editorial point of view while creating a thoughtful path from intelligence to action.

“Advisory firms have access to tremendous expertise, but it is often fragmented and disconnected from the larger decisions leaders are trying to make,” Ficarra said. “We want to help firms understand the challenge first and then provide relevant intelligence, resources and relationships that can help them determine what to do next.”

Beyond the Page

Modern American Advisor also extends beyond publishing through the **Modern American Advisor Private Members Club**, a distinct community for advisors and industry leaders.

The club creates opportunities for meaningful relationships through private gatherings, executive conversations, curated introductions and premium experiences.

Together, the company’s publishing, intelligence, strategic partnerships and private experiences are designed to inform and connect the people building the next generation of advisory firms while recognizing that their interests and influence extend well beyond the business itself.

Bringing the Conversation to Future Proof

Modern American Advisor will bring its expanded platform to **Future Proof this September** through on-site interviews and editorial conversations with advisors, executives, technology leaders and other industry participants.

The company’s initial Build to a Billion coverage will examine the questions shaping the next era of advisory businesses:

Can firms sustain organic growth without becoming dependent on acquisitions?

Where can artificial intelligence create meaningful value?

What prevents successful practices from becoming scalable enterprises?

How are leadership and succession affecting long-term firm value?

Conversations from Future Proof will inform upcoming coverage across Modern American Advisor's print, digital and multimedia channels.

"Our ambition is to build a media and intelligence platform that becomes essential to the people shaping financial advice in America," Sullivan said. "Not simply by reporting on where the industry has been, but by helping define the conversations that determine where it goes next."

About Modern American Advisor

Modern American Advisor is a premium U.S. media, intelligence and influence platform serving the financial advice, RIA, wealth management, investment, technology and professional services ecosystem.

Unlike traditional financial media focused primarily on markets, products and industry news, Modern American Advisor takes a broader view of the advisor as both a financial professional and a sophisticated consumer of business, leadership, technology, culture and experiences.

Through original journalism, premium publishing, audience intelligence, multimedia programming, research, strategic partnerships and high-value experiences, Modern American Advisor informs and connects the people and businesses shaping the future of financial advice in America.

Build to a Billion: build.modernamericanadvisor.com

Modern American Advisor: www.modernamericanadvisor.com

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