



# Margaret Dechant, CFP®

Chief Executive Officer | 6 Meridian

***Welcome & 6 Meridian Update***



6 MERIDIAN

# *Company Update*

Investor Summit | May 2025





# 6 Meridian Vision

To *grow* and *expand* our business by focusing resources on the specific needs of our clients and their families

Bring *inventive* solutions to our clients to meet their specific investment and planning objectives

Add *capability* and *knowledge* to our team in line with our clients needs

Invest in our own business and in our *community*





# *Growth & Expansion*

	<i>September 2016</i>	<i>May 2025</i>
<i>Total Assets</i>	<b>\$0</b>	<b>\$5 Billion</b>

Data as of 5/2/2025



# *Growth & Expansion*

	<i>September 2016</i>	<i>May 2025</i>
<i>Total 6 Meridian ETFs</i>	\$0	<b>\$1.33 Billion</b>

Data as of 5/2/2025



# *Growth & Expansion*

	<i>September 2016</i>	<i>May 2025</i>
<i>Total Alternatives</i>	\$0	\$688,879,131

Data as of 5/2/2025



# *Growth & Expansion*

	<i>September 2016</i>	<i>May 2025</i>
<i>Compass Financial Plans</i>	0	1,000+

Data as of 5/2/2025



# *Growth & Expansion*



## *Team Members*

Advisors  
Paraplanners  
Clinet Service  
Investment  
Management  
Operations &  
Strategy

*September 2016*

*13*

6

0

3

3

1

*May 2025*

*31*

11

3

6

6

5





# *Our Team*





# *Growth & Expansion*

	<i>September 2016</i>	<i>May 2025</i>
<i>Office Square Footage</i>	<b>3,500</b>	<b>12,200</b>



# *Disclosures*

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