LARSON
FINANCIAL GROUP



Dear Larson Community,

As we move into the final stretch of 2026, I've been reflecting on just how much this year has represented for Larson Financial Holdings. Celebrating 20 years in business has given us the opportunity to look back with gratitude, but it has also reminded us why we continue to build and grow. Thinking back to our humble beginnings when we started off with only two staff in one tiny office, we now have over 300 employees in 31 locations, serving clients in all 50 states. Additionally, this year we increased the assets we steward to over $12 billion. That is incredible growth!

Even though we have grown, our mission remains the same: **Empowering All to Flourish**. That mission comes to life in many ways, from the guidance we provide clients and the opportunities we create for investors, to the partnerships we form and the communities we serve. This quarter offered meaningful examples of each.

Celebrating 20 Years Together

In August, nearly 200 colleagues and approximately 100 family members gathered in St. Louis for our 2026 Summer Celebration. This year's theme, Hope: Then & Now, invited us to reflect on Larson's journey from a small financial planning firm founded in 2006 to the broader family of companies we are today.

We celebrated the people who helped shape our first 20 years, shared ideas about where we are headed next, and made time to reconnect across teams and offices. The milestone was not simply about looking back. It was a reminder that growth matters most when it helps us serve people better and create more opportunities for others to flourish.

Putting Our Mission to Work

One of the most meaningful parts of Summer Celebration happened outside the meeting rooms. More than 150 Larson Warriors partnered with LifeWiseSTL and Hope Nation Church for a day of hands-on service in the St. Louis community.

Together, our teams prepared and served lunch, sorted shoes and household essentials, unpacked and distributed food for local families, and completed improvement projects at the church. One crew dismantled a broken accessibility ramp and built a new one in its place. It was hard work, meaningful work, and a powerful picture of what can happen when many people bring their time and talents to a shared purpose. Click here to check out what we accomplished together.

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This service day built on our June partnership with JOY FM and Oasis International, where volunteers supported projects benefiting immigrant and refugee families in St. Louis. These efforts are part of our broader goal of seeing 100,000 individuals flourishing by 2030. Financial guidance is an important part of that vision, but flourishing also happens through strong neighborhoods, practical support, and human connection.

A New Chapter with EquityMultiple

We are also pleased to share a new relationship between Larson and EquityMultiple, an online commercial real estate investment platform that has served investors for nearly 12 years. Larson has sponsored multiple investments on the platform over the past five years, giving our teams an established foundation of trust and shared experience.

Effective August 1, EquityMultiple licensed its platform and brand to Larson Capital Management. We are proud to now be the day-to-day operator of the platform and the majority of their team moved to Larson. This exciting new relationship combines EquityMultiple's established technology and investor community with Larson Capital Management's experience sourcing, underwriting, and managing real estate and alternative investments. It also creates a more direct connection between investors and the teams.

Continuing to Grow with Purpose

Two additional milestones from earlier this year are worth celebrating. Larson Financial Holdings was named a St. Louis Top Workplace for the second consecutive year, an honor based entirely on employee feedback. We also welcomed Ta-Check Financial into the Intrua Financial platform, expanding the resources and support available to its team while preserving continuity for the people they serve.

Across the Larson family of companies, our teams remain focused on responsible growth, careful due diligence, and personal service. Whether clients are navigating retirement decisions, evaluating alternative investments, or working through a changing student loan landscape, our goal is the same: to provide clarity, confidence, and support for the road ahead.

Looking Ahead

Twenty years have taught us that meaningful growth happens through thousands of decisions to listen carefully, serve faithfully, keep learning, and take the next right step.

Thank you for being part of the Larson story. Whether you have been with us for many years or are newer to our community, we are grateful for your trust and partnership. We are excited about what lies ahead and committed to building the next chapter with the same purpose that brought us here.

With gratitude,

Paul Larson, CFP®
Founder & CEO
Larson Financial Holdings

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