

Chalice Connect Partners with Lion Street Financial to Bring Advisors Much Needed Access to a Robust Digital Marketplace

Lion Street now offers a marketplace that will help advisors save time, money, and easily access exclusive benefits vital to running their businesses.

SAN DIEGO, CA, USA, January 17, 2023 /EINPresswire.com/ -- Chalice Connect proudly announces the addition of Lion Street Financial, LLC as its latest enterprise partner. Chalice Connect is

a SaaS company focused on marketplace platform technology that digitally delivers member benefits to the nation's leading financial institutions, associations, and societies. With single sign-on technology, Chalice digitally delivers a suite of benefits that helps throughout the entire lifecycle of a business. In turn, Lion Street now offers a digitally accessible marketplace that will

help their advisors save time, money, and easily access exclusive benefits vital to running their businesses efficiently.

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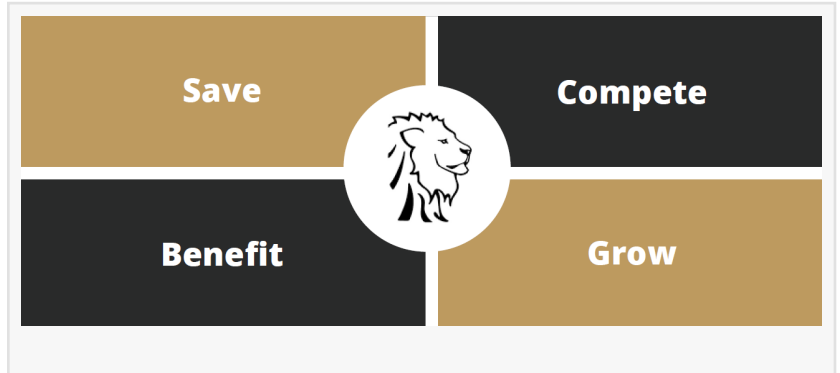
We are continually looking for ways to create value and growth for our firm owners and we are confident that the Chalice marketplace platform is the right solution.”

John Burmeister

“It doesn't get any better than partnering with Lion Street. We are seeing a digital divide across the financial industry, and Chalice was created to help these companies and organizations bridge the technology gap. We are dedicated to empowering our partners to give their people the tools, resources, and benefits they need to be at their very best. Our marketplace technology allows them to deliver

benefits and discount programs quickly and cost-effectively, while enhancing both the business lives and personal lives of its members – creating a greater sense of community,” states Keith Gregg, CEO of Chalice.

Chalice Connect gives financial institutions the power to provide its members with a unified, seamless experience through single sign-on technology, eliminating the hassle of integrating multiple solutions. Through its comprehensive platform, firms can access exclusive benefits and



discount programs. With solutions from legal and compliance support to accounting and everything in between. Backed by customizable marketplace technology that makes it easy to integrate existing solutions and add new benefits as they roll out.

“The team at Lion Street Financial is very excited about this opportunity. We are continually looking for ways to create value and growth for our firm owners and we are confident that the Chalice marketplace platform is the right solution. Lion Street Financial has always valued an Owners First mentality so we understand the complexities and costs of running an independent financial services business. This partnership helps increase that strategic alignment between our Broker Dealer and firm owners,” says John Burmeister, President and CEO of Lion Street Financial.

“We couldn’t be prouder of this new partnership. The addition of Lion Street validates the importance of creating communities. We want to encourage firms and organizations to embrace the idea of community, and our partnership with Lion Street is a huge step forward in achieving just that,” explains Keith Gregg, adding, “Chalice marketplace platform allows Lion Street to bring vital solutions to their advisors and give them access to top-tier tech with huge savings. This partnership validates the leadership role Chalice plays in bridging the digital gap and helping all types of businesses bring better benefits to their members.”

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About Chalice Connect

Chalice Connect is a Digital Marketplace PaaS (Platform as a Service) with a community of 60,000+ business owners consisting of Financial Advisors, RIAs, IBDs, CPAs, Insurance Agents, Attorneys, and Allied Financial Services Professionals. Chalice was purposely built to give small to mid-sized business owners economies of scale, operational efficiency, and enhanced enterprise value through a marketplace-based model. Chalice’s goal is to help expand brands into networks, from linear businesses into holistic constellations. Learn more about Chalice Network at <https://www.chaliceconnect.com/>.

About Lion Street

Lion Street Financial is a Broker Dealer built for Lion Street firms by Lion Street firms. There is complexity in the financial services industry ranging from diverse client needs, expansive product offerings and a regulatory landscape consisting of 103 industry regulators. Our structure creates alignment for Registered Representatives and their clients by providing seamless access to product expertise, ideas, new markets, and a more comprehensive approach to regulation impacting the financial services industry.

Lion Street Financial ranks number 37 on the list of largest broker dealers in a field of 3,500,

putting us in the top 1% across the industry. We have built a contemporary platform with industry leading technology and personalized service that is poised for continued growth and value creation for our advisors. Learn more about Lion Street Financial at www.lionstreet.com.

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