

# CHALICE CONNECT PARTNERS with THURSTON SPRINGER to LAUNCH RIA SERVICES EXCHANGE

*RIA Services Exchange is the One Stop Shop for RIAs and Advisors*

MELBOURNE, FL, UNITED STATES, March 26, 2025 /EINPresswire.com/ -- Chalice Connect, the leading B2B digital marketplace platform, is proud to announce its strategic partnership with



RIA Services Exchange is the Holy Grail for RIAs and Advisors who want help with running, growing, protecting, and monetizing their business"

*Keith Gregg, Founder/CEO,  
Chalice Connect*

Thurston Springer, a national and rapidly growing RIA services provider, to power the launch of RIA Services Exchange™.

This preeminent digital marketplace is designed to meet the unique business needs of RIAs and independent advisors, offering exclusive benefits, discounts, and savings on essential products and services.

By leveraging Chalice Connect's innovative technology and software solutions, RIA Services Exchange provides a one-

stop-shop platform where advisors can access over 100+ best-in-class solutions at pre-negotiated, discounted rates, including:

- Affordable group health insurance
- Risk management and compliance services (via OCCO - Outsourced Chief Compliance Officer)
- Sales and marketing support
- Tax and legal services
- Custody and clearing solutions
- Lending, M&A, and succession planning services

"We couldn't be happier to partner with the fine folks at Thurston Springer, who bring over three decades of experience in delivering exceptional service and support to independent advisors," said Keith Gregg, Founder & CEO of Chalice Connect. "This partnership exemplifies the power of innovation and collaboration in creating a digital ecosystem that truly empowers financial advisors to both save and grow."

“Keith and I have been partners on several successful ventures, from the early years at Wells Fargo Advisors Financial Network to building the Wealth Advisor Institute,” said John Peluso, Executive Vice President and Partner at Thurston Springer. “With RIA Services Exchange, we’re taking our shared vision to the next level—offering independent advisors the technology and resources they need to thrive in an ever-evolving financial landscape.”

Powered by Chalice Connect’s cutting-edge marketplace technology, RIA Services Exchange ensures seamless access, operational efficiency, and significant cost savings, giving independent advisors the tools they need to scale their businesses and enhance client service. The new

endeavor will help to level the playing field for independent advisors by providing them with access to top-tier technology, products, and services at discounted rates through Chalice Connect’s purchasing power.

#### About Chalice Connect

Chalice Connect is the industry’s leading B2B digital marketplace platform, designed to empower RIAs, independent advisors, and small businesses by providing access to exclusive products, services, and technology solutions. Through strategic partnerships and a robust digital ecosystem, Chalice Connect delivers Fortune 500-level benefits at a fraction of the cost. For more information, visit [www.chaliceconnect.com](http://www.chaliceconnect.com).

#### About Thurston Springer

Thurston Springer is a national financial services organization that operates through its subsidiaries, including Thurston Springer Financial (broker-dealer), Thurston Springer Advisors (RIA), Bristol Lane Group (tax and consulting), and Thurston Springer Insurance. Since 1981, Thurston Springer has provided comprehensive wealth management and financial planning services to individuals, institutions, and family offices.

For more information on RIA Services Exchange, visit <https://riaservicesexchange.com>



**CHALICE**  
**CONNECT**

CONNECTING SMBs WITH BENEFITS, DISCOUNTS,  
SAVINGS

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