

# Vanderbilt Financial Group Accelerates Growth, Welcoming Chamberlain Group, Irvine, CA-based \$1.2 Billion Team

WOODBURY, NY, UNITED STATES, November 12, 2025 /EINPresswire.com/ -- Vanderbilt Financial Group ("VFG") proudly announces the addition of Chamberlain Group, a highly respected wealth management group based in Irvine, California, representing \$1.2 billion in assets under management (AUM). The Chamberlain team's decision to affiliate with Vanderbilt marks a major milestone in VFG's continued national expansion. It underscores its growing appeal among top-tier independent advisors looking for a Firm focused on culture, flexibility & unmatched support.

The affiliation of Chamberlain Group strengthens Vanderbilt's West Coast presence and exemplifies the Firm's momentum in attracting experienced, growth-minded advisor teams.

"Chamberlain Group embodies the entrepreneurial spirit and client-first philosophy that define Vanderbilt," said Joe Trifiletti, President of Vanderbilt Financial Group. "Our growth this year has been remarkable, but what excites us most is the caliber of people choosing to build their future at our Firm."

With this new addition, Vanderbilt continues to position itself as one of the fastest-growing mid-sized independent broker-dealer and RIA platforms in the industry—empowering advisors with the resources, flexibility, and technology to thrive in an evolving marketplace.

Chamberlain Group Transitions to Vanderbilt



Vanderbilt Financial Group Logo



Chamberlain Group Logo

Founded over 40 years ago, Chamberlain Group has established itself as a premier advisory group serving ultra-affluent business owners and families nationwide. Chamberlain Group is widely respected for its expertise in legacy planning, wealth protection, and intergenerational stewardship, with a distinctive approach that integrates both investment management and insurance solutions to deliver comprehensive wealth strategies.

Prior to joining Vanderbilt, Chamberlain operated independently through Spire Wealth and Spire Securities, headquartered in Irvine, California, while serving clients across the United States. Through its new affiliation with Vanderbilt, Chamberlain aims to leverage expanded operational scale, advanced compliance infrastructure, and a broader national platform to accelerate its next phase of growth.

"Vanderbilt is a professional and collaborative organization that is committed to serve independent advisors like Chamberlain Group who specialize in serving the special needs of business owners and high-net-worth clients. We are excited to join forces." said Michael J. Kiley, Founder & CEO of Chamberlain Group.

#### Behind the Match: Cross-Search's Role in the Introduction

Vanderbilt and Chamberlain both extend their sincere appreciation to Jodie Papike and the team at Cross-Search Advisor Placement Services, whose unmatched industry insight and professionalism were instrumental in bringing the two organizations together. Papike's deep understanding of advisor transitions helped identify the right cultural and strategic fit, facilitated meaningful dialogue, and shepherded the process from initial introduction through successful completion.

"Cross-Search is thrilled to have facilitated the strategic partnership between Chamberlain Group and Vanderbilt Financial Group. This transition represents an ideal alignment of resources, collaboration, and vision, and we are honored to have played a role in bringing the two organizations together. We look forward to seeing Chamberlain Group thrive in this new chapter!" - Jodie Papike, President of Cross Search

#### About Vanderbilt Financial Group

Vanderbilt Financial Group is a mid-sized national independent broker-dealer and registered investment advisor platform headquartered in Woodbury, New York, with over 300 advisors located across the United States. Vanderbilt provides its network of advisors with comprehensive operational support, compliance resources, innovative technology, and infrastructure to help them scale their businesses and deliver exceptional client service.

The firm is recognized for its distinctive culture, personalized support, and commitment to advisor independence—offering flexibility, innovation, and a relationship-driven approach that sets it apart within the financial services industry.

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