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Contact: Ryan Kenney at (215) 805-1075 or [rkenney@ccmg.com](mailto:rkenney@ccmg.com)





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In 1983, Wally Weitz invested \$11 million for his first clients with a common-sense formula: own a group of strong businesses purchased at deeply discounted stock prices. Weitz Investment Management has grown since then, but that philosophy – built on Wally's market instinct and belief in rational, patient investing – has stayed the same.

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Contact John Gabriel at 203-938-3021 or [jgabriel@weitzinvestments.com](mailto:jgabriel@weitzinvestments.com)

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Contact: Matt Roesser at (267) 251-8487 or [matthew.g.roesser@ampf.com](mailto:matthew.g.roesser@ampf.com) or Mike L. Hartnett at (610)825-9055 or [Michael.L.Hartnett@ampf.com](mailto:Michael.L.Hartnett@ampf.com)



### **Cavalan Hill Funds**

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Contact Joseph B. Mondell at 410-409-2310 or [jmondell@cavalanhill.com](mailto:jmondell@cavalanhill.com)



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Contact: JP Azar at 610-971-6596 or [jp.azar@schwab.com](mailto:jp.azar@schwab.com)

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Cohen & Steers is a leading global investment manager with a long history of innovation and a focus on real assets, including real estate, infrastructure and commodities. In 1986, Martin Cohen and Robert Steers established Cohen & Steers as the first investment company to specialize in listed real estate. As the global real estate securities market evolved, we expanded our operations to Europe and Asia Pacific, forming the industry's largest global investment team dedicated to real estate securities. Through careful consideration, we have added to our investment offerings over the years, developing related strategies designed to meet investors' increasing demand for dividend income and real returns.

Contact: Ron Pucillo at (201) 926-0163 or [rpucillo@cohenandsteers.com](mailto:rpucillo@cohenandsteers.com)

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### **Deutsche Asset & Wealth Management**

With approximately \$836 billion of assets under management (as of September 30, 2015), Deutsche Asset Management is one of the world's leading investment management organizations. Deutsche Asset Management offers individuals and institutions traditional and alternative investments across all major asset classes.

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The Chief Investment Office is ultimately responsible for the performance of Deutsche Asset Management's active investment strategies, as well as having oversight of investment processes. It also generates Deutsche Asset Management's global investment outlook (CIO View).

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Contact: Brian MacDonald, RIA & Bank Trust at 312-537-8623 or [brian.macdonald@db.com](mailto:brian.macdonald@db.com)

Contact: Gavin McIntire, ETF Specialist at 410-209-7762 or [gavin.mcintire@db.com](mailto:gavin.mcintire@db.com)



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Contact: Paige Hill at (610) 684-1100 ext. 4053 or [phill@emoneyadvisor.com](mailto:phill@emoneyadvisor.com)



### **Gateway Mortgage Group**

Contact Nick Maningas at 610-832-0666 Ext. 224 or [nick.maningas@verizon.net](mailto:nick.maningas@verizon.net)



### **Investment Management Consultants Association® (IMCA®)**

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Contact Lara Davies at 303-850-3081 or [lavies@imca.org](mailto:lavies@imca.org)



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Contact Jessica Sterling at (201) 369-8556 or [Jessica.sterling@tdameritrade.com](mailto:Jessica.sterling@tdameritrade.com)



### **Victory Capital Management**

Victory Capital Management is an independently owned global asset management firm with \$35 Billion in assets under management and advisement. We expanded our multi-boutique investment model to include a broader set of distinct investment franchises, each with an independent investment culture and approach. Our franchises are supported by a robust distribution and operational platform, allowing them to focus solely on providing investment excellence on behalf of our clients.

Contact: Joe Powers, Regional Sales Director, NY, NJ, Eastern PA at (516) 238-4506 or [jpowers@vcm.com](mailto:jpowers@vcm.com)

## **BRONZE**



### **LMCG Funds**

LMCG Fund's adviser is LMCG Investments, LLC. LMCG is a \$7 billion multi-strategy boutique investment firm in Boston. As the Advisor to the LMCG Funds, our institutional investment teams are supported by experienced compliance, operations and marketing professionals. The leadership of LMCG has a history of delivering global trading, settlement, and operational capabilities for strategies invested in over 40 countries. Represented to Advisors by Endeavour Investment Partners.

Contact George Zydel, Jr. at 781-749-6040 or [gzydel@endeavourmanagers.com](mailto:gzydel@endeavourmanagers.com)