FPA FINANCIAL PLANNING ASSOCIATION OF THE PHILADELPHIA TRI-STATE AREA

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Contact: Tom Mesko at (215) 863-8125 or tmesko@philafound.org

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Clark Capital Management Group

Clark Capital Management Group is an independent asset management firm providing institutional quality investment solutions to individual investors, corporations, foundations, and retirement plans. The firm was founded in 1986 and has been entrusted with approximately $3.3 billion in assets. Our investment philosophy is driven by a single-minded focus: to add value for our collective clients. This focus requires us to seek superior risk-adjusted returns over full market cycles. It compels us to maintain a long-term perspective and provide innovative investment management solutions that enable clients to achieve their life goals.

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

Weitz Investment Management
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.

Our research team is known for their ability to spot investment opportunities. We build on that with reasoned research, intense analysis and a hefty dose of common sense. All of our analysts have circles of competence, allowing them to develop a deeper understanding of specific sectors. After all, when you know the terrain well, it's easier to recognize opportunities when they come up.

Now, decades later, we are responsible for approximately $5 billion in investments for our shareholders – individuals, corporations, pension plans, foundations and endowments. And our commitment remains the same: to put our clients first. Always. We do so through our expertise, our flexibility, and our drive to uncover investments that can help them preserve and grow wealth.

Contact John Gabriel at 203-938-3021 or jgabriel@weitzinvestments.com

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Ameriprise Financial
Since we were founded by John Tappan in 1894, we at Ameriprise Financial have stayed true to our mission: To help people feel confident about their financial future. During trying economic times our strength, integrity, our breadth of services and personal relationships have made us America's leader in financial planning.*

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

Cavanal Hill Funds
The purpose of Cavanal Hill Funds is not unlike the purpose of a mutual fund. We exist so that you can benefit from a collection of equities, bonds and other securities carefully chosen for maximum growth and income. And we exist only because of you, the investor. After all, mutual funds can only succeed if they are mutually beneficial.

We're proud to say that our mutual funds—and our investors—have been successful. Our history of strong performance sets us apart and demonstrates our passion to see your hard-earned money work even harder. What further distinguishes our company is our commitment to building relationships with our clients, a philosophy that has contributed to our longevity as much as anything.

Your money—your future—is our priority. At Cavanal Hill Funds, rest assured that we never forget that. And we will apply every ounce of experience, modern technology and industry knowledge we have to make sure you never forget that.

Contact Joseph B. Mondell at 410-409-2310 or jmondell@cavanalhill.com

Charles Schwab Investment Services

Schwab empowers independent investment advisors to achieve more—for themselves, their firms, and their clients. For more than 25 years, we have worked side by side with advisors to help them reach beyond the status quo and to stand out in fiercely competitive markets. Today, we work with nearly 7,000 RIAs, and they entrust more assets to us than to any other custodian. We are committed to helping RIAs thrive. Schwab Advisor Services™ is a business segment of Charles Schwab & Co., Inc.

Contact: JP Azar at 610-971-6596 or jp.azar@schwab.com

Cohen & Steers

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

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.

Innovative products, customized solutions
Our products and solutions provide flexible access to a wide range of investment opportunities across all asset classes. Products range from pooled funds to highly customized portfolios for a wide range of investors. They include active and passive funds, institutional mandates, and structured products.* We are dedicated to creating asset management solutions for every client need and every risk, return and liquidity preference.

Chief Investment Office
The Chief Investment Office has overall responsibility for Deutsche Asset Management's investment platform. It leads equity, fixed income and multi-asset portfolio management teams worldwide, as well as the business' global research team.

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).

*not all products offered in all jurisdictions.

Contact: Brian MacDonald, RIA & Bank Trust at 312-537-8623 or brian.macdonald@db.com
Contact: Gavin McIntire, ETF Specialist at 410-209-7762 or gavin.mcintire@db.com

[eMoney Advisor]

Based in Conshohocken, PA, eMoney Advisor builds a comprehensive and interactive digital wealth-management solution that transforms the way financial professionals deliver their expertise, strengthen client relationships, and grow their business. Now, with its brand new platform, emX, advisors can view and manage their entire book of business within one easy-to-navigate and fully integrated platform. Featuring an intuitive interface, powerful data integrations, resources to improve efficiency, and interactive financial planning tools that meet a client's needs throughout their entire life-cycle, emX is more than just wealth management software, it's a better way of doing business.

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

Gateway Mortgage Group

With over 90 offices in 39 different states, Gateway Mortgage Group is one of the largest privately held mortgage companies in the country. Since 2000, our driving purpose is to serve communities and families through homeownership.

We offer a robust line of loan products to meet nearly any need:

- Conventional FHA, VA and USDA
- Construction and Rehab (including Single-close and FHA 203K)
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Reverse Mortgages

Using a reverse mortgage line of credit, or tenure income, can positively impact the survival of a retiree's cash flow. Nick Maningas specializes in reverse mortgage lending. He works to develop a custom-tailored plan that could utilize a reverse mortgage program to help meet an individual's cash flow needs.

Gateway's mortgage professionals stand ready to assist FPA members and their clients with any of their mortgage lending needs. Give them a call today!

Contact Nick Maningas, at 610-263-8719 or nick.maningas@verizon.net or John Sly, 610-263-8463 or Scott Gaev, 610-263-8468

Investment Management Consultants Association® (IMCA®)

IMCA is the only professional association dedicated to advanced investment advisors and wealth managers. IMCA's Certified Investment Management Analyst® (CIMA®) and Certified Private Wealth Advisor® (CPWA®) certifications, conferences, and membership provide financial professionals with the education and expertise to grow their business and better serve their clients.

Contact Lara Davies at 303-850-3081 or lavies@imca.org

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

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

Invesco Ltd.

Invesco Ltd. Is a leading independent global investment management firm, dedicated to helping investors worldwide achieve their financial objectives. By delivering the combined power of our distinctive investment management capabilities, Invesco provides a wide range of investment strategies and vehicles to our clients around the world. Operating in more than 20 countries, the firm is listed on the New York Stock Exchange under the symbol IVZ. Additional information is available at www.invesco.com.

Contact Blaise Grippa, Regional Director at 718-974-7159 or blaise.grippa@invesco.com