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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ACE Insurance Group is one of the world's largest multiline property and casualty insurers. With operations in 54 countries, ACE provides commercial and personal property and casualty insurance, personal accident and supplemental health insurance, reinsurance and life insurance to a diverse group of clients. Barry Yoder is our local contact for ACE's Private Risk Services Division. The Private Rick Services Division provides personal risk management solutions for individuals with @ $5M in Net Worth. Barry's goal is to make stronger connections with financial planners who are focused on providing superior protection for their clients' assets.

Contact: Barry Yoder at (610) 597-8120 or barry.yoder@acegroup.com

[Clark Capital]

Clark Capital Management Group is an independent investment advisory 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 $2.8 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 advisor clients to achieve their life cycle goals.

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

[Franklin Square]

Franklin Square is a leading manager of alternative investment funds designed to enhance investors' portfolios by providing access to asset classes, strategies and asset managers that typically have been available to only the largest institutional investors. The firm's funds offer "endowment-style" investment strategies that are designed to complement a fixed income portfolio. The firm's alternative strategies seek to provide income, risk-adjusted return and a potential hedge against rising interest rates. Founded in Philadelphia in 2007, Franklin Square currently manages five funds with over $11 billion in assets as of March 31, 2014. Each fund is sub-advised by GSO / Blackstone. To learn more about Franklin Square and alternative investments please visit www.franklinsquare.com.

Contact: Stephanie Brown at (215) 220-4303 or stephanie.brown@fs2cap.com

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Schroders is a 200+ year old Global Asset Manager with close to 450 billion in assets. Headquartered in London but with offices in 27 different countries allows them to offer a truly unbiased approach to investing globally. Schroders has been categorized as an organic boutique due to its investment culture

Contact: Chris Alexander at (917) 545-6933 or chris.alexander@schroders.com

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[American Century]

American Century Investments is a leading privately-held investment management firm, committed to delivering superior investment performance and building long-term client relationships since its founding in 1958. Through its unique ownership structure, more than 40% of its profits support the Stowers Institute for Medical Research, a basic biomedical research organization dedicated to improving quality of life by researching and uncovering the causes, treatment, and prevention of gene-based diseases. Since 2000, more than $1 billion in dividends have been distributed to the Stowers Institute.

Contact: Bob Karas at (215) 990-3215 or rk2@americancentury.com

[Ameriprise]

*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

Brinker Capital

Brinker Capital offers many investment solutions and services to meet your clients' needs, from a mutual fund program to absolute return portfolios. Most importantly, we assume fiduciary responsibility for every portfolio that we construct, every asset we allocate and every manager we select. You can be assured that there is nothing we do with your clients' money that we wouldn't do with our own.

Contact: Frank Pizzichillo at (610) 731-6566 or fpizzichillo@brinkercapital.com

Cohen and 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

Cole Capital

Cole Capital is an industry leading non-listed REIT sponsor that creates innovative net-lease real estate products that serve individual investors and financial professionals. Built on more than 35 years of experience, Cole Capital's strategy seeks to collect rent from industry-leading corporations and provide a stream of income to investors through non-listed real estate investment trusts (REITs).

Contact: Gordon Miller at (617) 833-1823 or gmiller@colecapital.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. 4063 or phill@emoneyadvisor.com

Hartford Funds

Hartford Funds are sub-advised by Wellington Management. Hartford Funds has total assets under management of $74.3B as of June 30, 2014 (excluding assets used in certain annuity products) and 45 Funds in a variety of styles and asset classes. Hartford Funds' relationship with Wellington Management started in 1996 and has grown over time.

Contact: Philip Shankweiler at (484) 467-1308 or philip.shankweiler@hartfordfunds.com

IP Brokerage

IP Brokerage is a full service insurance brokerage providing risk management solutions as well as marketing and administrative support to financial professionals and insurance producers. We offer a complete line of the industry's most competitive life, long term care, annuity and disability products.

Contact: Michael Rowe at (215) 207-9435 or mrowe@ipbrokerage.com

Morningstar

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Contact: Joe Falkenberg at (312) 384-4806 or joseph.falkenberg@morningstar.com

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Contact: Charlie Latimer at (201) 369-8823 or charlie.latimer@tdameritrade.com

Walton International

Walton is a multinational real estate investment firm concentrating on the research, acquisition, planning and development of strategically located land in major North American growth corridors. Since 1979, Walton has grown into one of North America's premier land asset managers with over $3.9 billion under management. Walton's investments provide institutional grade diversification for accredited investors, and are structured to perform in all economic conditions with no leverage, investor alignment, proven exit strategies, and transparency.

Contact: Andrea Thoreson at (480) 586-9243 or athoreson@walton.com

Wiggin and Dana

Wiggin and Dana is a full-service law firm with 150 lawyers representing clients throughout the country and abroad through our offices in Philadelphia, New York and Connecticut. Our Investment Adviser and Broker-Dealer practice group works closely with investment advisers, broker-dealers and funds of all sizes in developing and implementing effective compliance controls to address regulatory and fiduciary issues under the Investment Advisers Act of 1940, the Investment Company Act of 1940, the Securities Exchange Act or 1934, ERISA and applicable state law and SRO rules. We offer a full range of legal and compliance services, including adviser and fund formation, registration of advisers, marketing and advertising, best execution, soft dollars, business continuity and client privacy issues, among others. We pride ourselves on seeking effective and efficient solutions to client problems and would be happy to discuss in more detail how our legal services can benefit your business.

Contact: Richard Levan at (215) 988-8316 or rlevan@wiggin.com

BRONZE

Equity Advisor Solutions

Equity Advisor Solutions provides custody technology and back-office solutions to RIA's, Hybrids, TAMP's, Broker-Dealers and other institutions. Equity provides custody of all asset types, including alternative assets, on one custodial platform. Our Back-Office solutions help streamline an advisors business and create efficiencies. We provide advisors with billing support, performance reporting, customized reporting, customized client portal, document storage, client vault and audit assistance. Our technology includes: portfolio rebalancing, the ability to run multiple models in the same account, customized mobile apps, reporting, analytic tools and much more.

Contact: Jason Zalarick at (720) 583-8825 or j.zalarick@equityadvisorsolutions.com

Kaplan Financial Education

Kaplan Financial Education offers test preparation and continuing education materials and courses for IT, financial, securities and insurance professionals. The company offers the most efficient, effective, and innovative study materials available in the industry in a variety of formats designed to fit different schedules, learning styles and budgets. With efficient, interactive online tools students won't find anywhere else, Kaplan provides the most comprehensive learning experience to help you advance in your career. Look to Kaplan Financial Education for Insurance Pre-licensing, Insurance Continuing Education, Securities Licensing, CFP(R) Certification, Professional Development and Certificates, and IT CertPrep.

Contact: Jennifer Kulasiewicz at (877) 311-9762 or jennifer.kulasiewicz@kaplan.com

RS Investments

At RS Investments, we move our clients forward. Together, we pursue consistent returns that draw on the right mix of critical thinking, deep research, and quantitative analysis. We are domain experts, not generalists, and that knowledge helps us deliver better outcomes for our clients. We believe success is defined by more than investment returns. There is a destination beyond performance where credibility, trust, and relationships matter. Our goal is to provide the long-term returns our clients expect to help them see further, plan smarter, and move forward. RS Facts Founded in 1986, today RS Investments serves a global client base, including institutions, financial advisors, and individuals.

Contact: Ted Wozniak at (484) 380-4816 or twozniak@rsinvestments.com

Jefferson National

Jefferson National, named the "Gold Standard" for pioneering the industry's leading tax-advantaged investing solution for RIAs and fee-based advisors, has surpassed more than $2 billion in AUM by helping over 2,200 advisors nationwide manage volatility and rising taxes-while helping their clients save over $60 million in insurance fees.

Contact: Jon Estes at (502) 587-3813 or jestes@jeffnat.com

Rainier Funds

Rainier Investment Management, LLC is an employee-owned investment management firm dedicated to enhancing client returns through insightful and disciplined identification of growth companies. We invest in all major market sectors because we believe that investment opportunities are found in industries that are frequently overlooked. Rainier is headquartered in Seattle, Washington with an office in New York City and manages $6.1 billion in assets as of 12/31/2014, including separate accounts, collective trusts and the Rainier Funds. Rainier remains focused on providing international equity, domestic equity, and fixed income portfolio management to financial advisors, institutional investors, and individual investors through Rainier's no-load family of mutual funds.

Contact: Mark Wolff at (206) 518-6600 or mark.wolff@rainierfunds.com