FPA FINANCIAL PLANNING ASSOCIATION OF THE PHILADELPHIA TRI-STATE AREA

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Contact: Dave Dawson at (610) 669-9139 or dave_dawson@vanguard.com or Michael Bellopede at Michael_bellopede@vanguard.com

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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

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Contact: Ryan Donovan at (631) 470-2758 or ryan.donovan@orionadvisor.com

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

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Contact: Cody Williams at (502) 398-6771 or **cwilliams@dplfp.com**

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Contact: Nigel Clarke at (610) 971-1545 or **nigel.clarke@schwab.com**

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Contact: Mark Van Ostenbridge at (610) 772-2460 or mark.vanostenbridge@fmr.com

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Contact: TJ Cotton at (201) 284-1670 or tj.cotton@tdameritrade.com

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With a heritage dating to our founding in 1922, USAA Investments has been managing money since 1971. Our investment management excellence is rooted in values of service, loyalty, honesty and integrity. Advisors and their clients don't need to be USAA members to benefit from our fixed-income expertise. USAA Investments has over $166 billion in assets under management as of December 31, 2017.

Contact: Jesse Carranza at (214) 801-7035 or **jesse.carranza@usaa.com**

Bronze Level

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Contact: Mike L. Hartnett at (610)825-9055 or michael.l.hartnett@ampf.com

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Contact: Brooks Biggs at (703) 245-4912 or biggsb@folioinstitutional.com

Oppenheimer Funds

Oppenheimer Funds was founded in 1959. Today, the firm is one of the industry's leading global asset managers. Our staff of more than 2,000 employees includes more than 170 investment professionals. We have offices in New York, Dallas, Seattle, Denver, and Rochester. The clients we serve include financial advisors, individual investors, small businesses, and institutional investors and their advisors and consultants. We offer investments in every major asset class, both traditional and alternative, and in a variety of investment vehicles. As of March 31, 2018, we have more than $249 billion in assets under management. The firm is a subsidiary of MassMutual, one of the largest and most respected insurance companies in the United States.

Contact: Matt Trimble at (646) 341-3357 or mtrimble@ofiglobal.com