FPA OF THE PHILADELPHIA TRI-STATE AREA

FPA of Philadelphia would like to thank and recognize our 2017-2018 sponsors. Below is a list of our sponsors, their sponsorship level and a description of their company and the products and services they offer....

Platinum
The Vanguard Group

Gold
Clark Capital Management Group
The Philadelphia Foundation

Silver
Ameriprise Financial Svcs.
Charles Schwab Advisor Services
Cohen & Steers
Envestnet Tamarac
Gateway Mortgage
Orion Advisor Services
TD Ameritrade Institutional

Bronze
Folio Dynamix (FDX Advisors)
Jefferson National Financial
Medicareful
XY Planning Network

Platinum Level

Vanguard

The Vanguard Group

The Vanguard Group is an American investment management company based in Malvern, Pennsylvania, that manages approximately $4 trillion in global assets. Vanguard offers financial advisors a full range of low-cost ETFs and mutual funds as well as innovative practice management solutions.

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

Gold Level

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

The Philadelphia Foundation

The Philadelphia Foundation partners with professional advisors to integrate charitable giving into their clients' financial and estate plans. Through tools that fit their financial and tax needs, your clients can do the most good right where they live. Our experienced professionals provide expert guidance so that the impact of your client's generosity will endure for generations to come.

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

Silver Level

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

[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

[Envestnet Tamarac]

Tamarac solves the most critical technology issue for independent advisors by integrating rebalancing, CRM, performance reporting, investment accounting and trading applications into an integrated, web-based solution. Over the last decade, Tamarac has built a reputation for delivering best-in-class software, training and support, servicing more than 800 independent advisory firms, collectively managing over $500 B in assets

Contact: Brian Valashinas at brian.valashinas@envestnet.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:

- Construction and Rehab (including Single-close and FHA 203K)
- Conventional FHA, VA, and USDA
- Specialized Loan Programs (like Jumbo, Adjustable Rate Mortgages, Section 184 Loans– Native American and more)

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 customtailored 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 ay 610-832-0666 Ext. 224 or Nicholas.maningas@gatewayloan.com

.

Orion Advisor Services

Orion Advisor Services, LLC (Orion) is the premier portfolio accounting service provider for advisors. The firm has unique insights into the advisory profession because it was founded for investment advisors by an investment advisor in 1999. Orion frees advisors from back-office tedium so they can enjoy their business again by devoting their time and energy to better serving clients. Orion provides the integrated and fully customizable technology solutions that advisors need to help them grow their businesses over the long term. The firm's technology solutions empower more than 825 advisory firms with total assets under administration in excess of $315 billion from more than 1,300,000 individual accounts. Orion is SSAE 16 Type II Audited and is the only ISO 27001 Certified portfolio accounting provider.

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

TD Ameritrade Institutional

TD Ameritrade Institutional is a leading provider of comprehensive brokerage and custody services to more than 5,000 fee-based, independent Registered Investment Advisors and their clients. Our advanced technology platform and outstanding personal support allows advisors to run their businesses more efficiently and optimize time spent with clients.

"TD Ameritrade Institutional, Division of TD Ameritrade, Inc., member FINRA/SIPC"

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

BRONZE

Folio Dynamix

FolioDynamix offers the most comprehensive, secure cloud-based wealth management technology platform for managing the full advisory lifecycle-proposal generation, research, model management, portfolio management, reporting and operations. The FolioDynamix wealth management platform is truly unified, eliminating silos and empowering advisors with a single platform to manage all customer accounts. FolioDynamix provides registered investment advisors, banks, broker dealers, custodians and wealth service providers with leading-edge technology to attract and retain advisors, accelerate client acquisition and gain visibility across all assets under management. The results are improved efficiency, stronger compliance, enhanced client service and faster growth. FolioDynamix is an Actua company (Nasdaq: ACTA). Follow us on Twitter @foliodx.

Contact: Nick Corsanico at (610) 213-9972 or nick.corsanco@foliodx.com

Jefferson National Financial

Jefferson National, pioneer of the first flat-fee Investment-Only VA (IOVA), built expressly to help RIAs and Fee-Based Advisors increase assets under management – and help their clients grow more wealth. Serving nearly 3.500 advisors nationwide with this unique platform for tax-advantaged investing – while helping their clients save over $135 million in insurance fees. Named the industry "Gold Standard" for creating this new category of IOVA, ranked on Barron's Top 50 Annuities for two consecutive years, and named Barron's top VA with alternatives, Jefferson National is winner of over 45 industry awards, including DMA Financial Services Company of the Year.

Contact Jonathan Barth at (502) 587-3806 or jbarth@jeffnat.com

Medicareful

Powered by Ritter Insurance Marketing in Harrisburg, Pennsylvania, Medicareful is the leading product comparison website for connecting clients with licensed insurance agents. Medicareful provides contracted agents a completely secure, CMS-compliant environment to enroll their clients in Medicare Advantage and Medicare Supplement plans online. Through calculated growth and adaptation, Medicareful is committed to providing the premier platform for agents seeking to expand their client base.

Contact Bill Thomas at (717) 540-3720 or **bill.thomas@ritterim.com**

XY Planning Network

XY Planning Network is the leading organization of fee-only financial advisors who specialize in working with Generation X & Generation Y clients. XYPN supports financial advisors who want to forget a new path in the industry, offering comprehensive resources for running a more successful business. Providng a turnkey solution for startup firms, existing practices, and large firms aiming to serve next-gen clients, XYPN is shaping the future of financial planning.

Contact Stacey Unruh at **stacey@xyplanningnetwork.com**