FPA OF THE PHILADELPHIA TRI-STATE AREA

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Contact: 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: 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

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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

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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.

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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 ay 610-832-0666 Ext. 224 or nick.maningas@verzon.net

BRONZE

FOLIO DYNAMIX

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