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Contact: Michael Bellopede at [Michael\\_bellopede@vanguard.com](mailto:Michael_bellopede@vanguard.com)

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



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



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Contact: JP Azar at 610-971-6596 or [jp.azar@schwab.com](mailto:jp.azar@schwab.com)

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Contact: Ron Pucillo at (201) 926-0163 or [rpucillo@cohenandsteers.com](mailto: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@investnet.com](mailto:brian.valashinas@investnet.com)



## Gateway Mortgage Group

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Contact Nick Maningas at 610-832-0666 Ext. 224 or [nick.maningas@verzon.net](mailto:nick.maningas@verzon.net)



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

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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.corsanico@foliodx.com](mailto:nick.corsanico@foliodx.com)



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Contact Jonathan Barth at (502) 587-3806 or [jbarth@jeffnat.com](mailto:jbarth@jeffnat.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 forge a new path in the industry, offering comprehensive resources for running a more successful business. Providing 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.

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