

Guy Acerra Ameriprise Financial • Roger Achtermann Citi Smith Barney • Stephen Agrista Comprehensive Financial Cons. • Paul Ahern WealthTrust - Arizona • Andrew Ahrens Ahrens Investment Partners • Brent / Rocky Akers / Jones Arvest Private Banking • Giles Almond Matrix Wealth Advisors • Lewis J. Altfest L.J. Altfest • Albert Alvey Investment Management • Harvey M.J. Ames Ames Planning Associates • Francis Amsler Merrill Lynch Private Banking and Investment Group • Anthony Anderson Anderson, Riley & Spoor, P.A. • George Andrade Edward Jones • Elisabeth Andreason Morgan Stanley • Garyn Angel Angel & Associates • Moez Ansari Compak Asset Management • Lois Anthonisen Anthonisen Financial • Reginald Armstrong Armstrong Wealth Management Group • John B. Levitt AXA Advisors • John Bagley Strategic Wealth Advisors • Bob Bailey Wachovia Securities • John Bailey Spruce Private Investors • Mark Balasa Balasa Dinverno & Foltz • Charles Balducci Merrill Lynch • Rob Ballan RB Capital Management • Laurence Balter Wailea Capital Group • Lawrence Barber Merrill Lynch • Stephen Barnes Barnes Investment Advisory • Jacque Barton AIG Advantage Capital • James Bashaw James E. Bashaw • Cern Basher Madison Wealth Management • Chuck Bean Heritage Financial Services • James Beaulieu Beaulieu Financial Services • Brian Bedford Legacy Financial Planning • Bonnie Bell-Curran Citi Private Bank • Andrew Berg Homrich & Berg • Norman Berk Professional Asset Strategies • Steven Berman Wachovia Securities • Gordon Bernhardt Bernhardt Wealth Management • Brandon Bernstein Merrill Lynch • Raj Bhatia Merrill Lynch Private Banking and Investment Group • Jarrod Biebel Wells Fargo • John Bird Albion Financial Group • Christopher Black Morgan Stanley • John Black Northwestern Mutual Financial Network • Edward E. Blacka Jr. Blacka & Hurney Financial Consulting • Jon Blum Merrill Lynch • Robert Boggs RP Boggs & Co • Robert Bolen Bolen Dodson & Associates • Frank Botta Bear Stearns • Kurt Box Cypress Advisory Services • Paul Brahim BPU Investment Management • Richard Bregman MJB Asset Management • Patricia Brennan Key Financial • Deborah Briskin Merrill Lynch • David Brochu StrategicPoint Investment Advisors • Brent Brodeski Savant Capital Management • Jesse Bromberg Morgan Stanley • Rick Brooks • Blankinship & Foster • Lon Broske Pines Wealth Management • Eric Brown Waddell & Reed • John Brown Brown Financial Advisory • Bruce Brugler Presidio Wealth Management • James J. Bruyette Sullivan, Bruyette, Speros & Blayney • Ralph Bryant Jr. Bryant, Foley & Associates • Thomas Buck Merrill Lynch • David Bugen RegentAtlantic Capital • Shawn Bumgardner Ameriprise Financial • David Burd TGS Financial Advisors • Timothy Burklow Ameriprise Financial • Shari Burns Paragon Investment Management • Michael Busch Vogel Financial Advisors • Ed Butowsky Chapwood Capital Investment Management • Scott Cadwell Cadwell Wealth Management Group • Carl Camp Eclectic Associates • Paul Carkonen Citi Smith Barney • Raymond Carota Brandywine Financial Group • B. Lane Carrick Sovereign Wealth Management • Thomas Carstens Lenox Advisors David Casalena Merrill Lynch • James Casey Integrated Wealth Management • Bak Chan Ameriprise Financial • Ross Charkatz Citi Institutional Consulting • Michael Chasnoff Truepoint Capital • Marguerita Cheng Ameriprise Financial • Roman A. Ciosek Citi Smith Barney • Robert Clarfeld Clarfeld Financial Advisors • Howard Cohen AXA Advisors • Stephen Cohn Sage Financial Group • Robert Collins The Collins Investment Group • John Condos Morgan Stanley • Christopher Conigliaro Hamowy, Conigliaro & Associates • Michael Conrad SunTrust Investment Services • James Copper Schwartz Copper Financial • Christopher Cordaro RegentAtlantic Capital • Pat Corkery Merrill Lynch • Fred Cornelius Burt Associates • Mark Cortazzo MACRO Consulting Group • James Cotto Wachovia Securities • Kimberly Cox West Financial Services • David Cross Merrill Lynch • Austine Crowe Efficient Market Advisors • Paul Curnes Janney Montgomery Scott • Mayur Dalal The Legacy Planning Group • Marc Daner Wachovia Securities • Ronald Davis Community Financial Advisors • Rafael De La Sierra Sierra Capital • Candace Deluca Wachovia Securities • Donald Demuth Mighty Oak Strong America Investment Co. • George Desaulniers Morgan Stanley • Mike Dewitt Smith & Howard Wealth Management • Sandra Diamond West Financial Services • Faquiry Diaz Merrill Lynch • Christopher G. Didier Robert W. Baird • P. J. DiNuzzo DiNuzzo Investment Advisors • Armond Dinverno Balasa Dinverno & Foltz • Jay D'Meza Wachovia Securities • Philip Dodson Merrill Lynch Private Banking and Investment Group • Steven Domenico Morgan Stanley • William J. Donnell Merrill Lynch Private Banking and Investment Group • Theodore Doremus Lara, Shull & May • Michael E. Dowell Citi Smith Barney Gerald Dubey Citi Smith Barney • Tony Dubose Legacy Wealth Management • George Duff Duff & Boynton Wealth Management • Richard Dunne Merrill Lynch • Jon Duprau Wachovia Securities • Peter Eckerline Merrill Lynch • Shaun Eddy Strategic Wealth Management Group • Ric Edelman Edelman Financial Services • Gary Edmonds Wachovia Securities • James Edwards Raymond James and Associates • Wendy Edwards Wachovia Securities • Mitchell D. Eichen The MDE Group • Jim Elder Elderado Financial • Byron Ellis Ellis & Ellis • Stacey Englander Janney Montgomery Scott • Raymond Erker LPL Financial Services • Stephen Ethen Merrill Lynch • Brian Evans BondStreet Wealth Management • Harold Evensky Evensky & Katz • Roger Faubel Dow Financial Services • Mark Feldman Inlign Wealth Management • Mike Feller Merrill Lynch • Marc Fischer Citigroup Institutional Consulting • Gregg Fisher Gerstein Fisher • Steven Flaten MainStreet Capital Management • Michael Fleege Ameriprise Financial • Doug Flynn Flynn Zito Capital Management • Carole Folsom Ameriprise Financial • Dan Foster DHF & Associates • Robert Francois Quintile Wealth Management • Greg Frech Merrill Lynch • Jay Freeberg JRF Asset Advisors • Mark Gabriel Ameriprise Financial • Kevin Gahagan Mosaic Financial Partners • Greg Galecki Galecki Financial Management • Eric Garcia Merrill Lynch • Kyle Gearhart Merrill Lynch • Michael Genovese Genovese Forman Burford & Brothers Financial & Insurance Services Raymond George Merrill Lynch • Richard Gerczak Ameriprise Financial • John Giacalone Financial Access Network • David Gilreath Sheaff Brock Investment Advisors • Barry Glassman Cassaday & Company • Alexander Glibbery Merrill Lynch • Robert Glovsky Mintz Levin Financial Advisors • Janel Goff Merrill Lynch/The Goff Group • Jacob Gold Jacob Gold & Associates • Randal Golden FGMK/Preservation Capital Partners • Alan Goldfarb Weaver and Tidwell Financial Advisors • Joseph Gordon Gordon Asset Management • Jamieson Grabenhorst CGC Financial Services • Matthew Grady Old North Advisors • Douglas Graeber D.A. Davidson • Danielle F. Grande Merrill Lynch • Meg Green Meg Green & Associates • Gary Greenbaum Greenbaum & Orecchio • Joshua Greenberg Bank of America Private Bank • Craig M. Greenway SFGM • Michael Grenon Grimes and Company • Chris Griesedieck Zemenick & Walker • Thomas Grimes Grimes & Company • Mark Groesbeck Stanford Group Company • Anthony Guinta Homrich & Berg • Ramesh Gulati Gulati Asset Management • Ajay K. Gupta Merrill Lynch • Kirk Hackbarth Kabarec Financial Advisors • Garrett Hadley Morgan Stanley • Alex Hales Merrill Lynch • Randall Hallier Retirement Plus • John Halperin Citi Smith Barney • Ted Halpern Halpern Financial • Eduard Hamamjian Global Equity Advisors • Shay Hamontree INVEST Financial • Michael Hanley AXA Advisors • Will Hardee RBC Dain Rauscher • G. Charter Harrison McAdams Wright Ragen • David Hartzell Cornell Capital Management • David Harvilicz Corilant Financial Management • John Hansenberg A.G. Edwards • Keenan Hauke Samex Capital Partners • William Haynes Haynes Barker Investment Management • W. Eric Hehman Austin Asset Management Company • Jordan Heller SMG Wealth Management • David Henderson The Henderson Group • Pete Henderson Morgan Stanley • David Herbst Herbst Financial Advisors • Aubrey Herman Ameriprise Financial • Kevin Hermening Hermening Advisory Services • Donald Hershberger Paramount Wealth Management • John Hill Pinnacle Advisory Group • Paul Byron Hill Professional Financial Strategies • Cynthia Hinds Hinds Financial Group • David Hiron A.G. Edwards • Neil Hokanson Hokanson Associates • Gretchen Hollstein Litman/Gregory Asset Management • James Holzapfel Wachovia Securities • Mark Homan Diversified Management • Jim Hopson Capital Advisory Group • Herb Hopwood Hopwood Financial Services • Patrick J Horan Horan Capital Management • Carter Hotchkiss Wachovia Securities • David Hou Merrill Lynch • Patricia Houlihan Houlihan Financial Resource Group • David Huber Huber Financial • Daniel Hughes Wachovia Securities • Jonathan Hyett Morgan Stanley • Douglas Iles Merrill Lynch • Joel Isaacson Joel Isaacson & Co. • Robert Jackson Vista Financial Advisors • Tracy Jackson Jackson Financial Management • Teresa Jacobsen UBS Financial Services • Jared Jameson WJ Interests • Bruce Johnson CapTrust Financial Advisors • Philip Johnson Johnson Financial Advisors • Sandra Johnson Johnson, Carrier, Kruchten, Anderson & Associates • Jeannette Jones The Asset Advisory Group • Marcus Jones Wachovia Securities • Richard Joyner Tolleson Wealth Management • Scot Jurczyk Financial Solutions Advisory Group • Mark Kafentzis Edward Jones Investments • Steven Kaye American Economic Planning Group • William Keen The Keen Insight Group • John Kellar Wachovia Securities • Craig Keller Litman/Gregory Asset Management • Ellison Kibler & Associates Merrill Lynch • Elaine Kiernan Financial Resource Associates • Paul King RBC Dain Rauscher • Roy Kissin Capital Capital Advisors • Douglas Kistler Merrill Lynch • Lauren Klein Klein Financial Advisors • Michael Klein Robert W. Baird • Shane Klingenstein Edward Jones • James Knight Vista Wealth Management • Jeffrey Koch KR Financial Services • Paul Koch Citi Smith Barney • Roy Komack Family Financial Architects • Robert Korljan Cambridge Wealth Management • Eugene Kostrewa Ameriprise Financial • Jeffrey Kowal Kowal Investment Group • Scott Krantz Mesirov Financial • Christopher Krell Cassaday & Company • Robert Kreske Founders Financial Network • Karl Kreshpane Morgan Stanley • Andrew J. Krone West Financial Services • Ryan Krueger Krueger & Catalano Capital • David Kudla Mainstay Capital Management • Leon Labrecque LJPR • Jason Labrum Citi Smith Barney • Jan Lambert Lambert and Associates • Michael Landsberg Merrill Lynch • K. Bruce Lang Wachovia Securities • Bruce Langer Tealwood Asset Management • Todd Larson Ameriprise Financial • Taeya Lauer D. A. Davidson & Co • Jeffrey Layman Morgan Stanley • Paul E. Lee Merrill Lynch • Tim Lee Merrill Lynch • David Lees myCIO Wealth Partners • Clarke Lemons CNL Bank Wealth Management • R. Cory Levetan Synergy Financial Advisors • Thomas Livaccari Merrill Lynch • Leon Loewenstine RiverPoint Capital Management • James Loftin Loftin Financial Group / Raymond James • Chad Lojewski Wachovia Securities • Robert Longfield Consulting Services Group • Kathleen Longo Accredited Investors • Todd Lowe Parthenon • Eddie Lyons Morgan Keegan • Duke Lyskin Lyskin Financial Advisory • Lawrence Maddox Horizon Advisors • Brian Mague Morgan Stanley • Christopher Mahoney Merrill Lynch • Serafino Maiorano Maiorano & Associates • Mary Malgoire The Family Firm • Christopher Malof Citi Smith Barney • Nico March The March Group of Wachovia Securities • Matthew Marckmann Morgan Stanley • Matt Markowski Markowski Investments • James Martin Stephens Financial Group • Sidney Martin Merrill Lynch • Chad Martindale Ameriprise Financial • Charles Massimo CJM Fiscal Management • Ira Materetsky Materetsky Financial Group • Mark Mathers The Bostonian Group • Paul Mauro Legacy Financial Advisors • Robert C. Mayes BlueCreek Investment Partners • Ronald Mazzarella LPL Financial • John Mcaulay Citi Smith Barney • David Mcbee Wachovia Securities • Michael McCain A.G. Edwards • Jeremiah McCarthy Wealth Advisors • Scott McCaskill Voso Financial Advisers • Alan McClain United Capital Financial Advisers • John Henry McDonald Austin Asset Management Co. • Jeremy McGilvrey Hill Country Wealth • Patrick McGrory Ameriprise Financial • John McIntyre Wachovia Securities • John McKeel McKeelGesek Financial Advisory Services • David McKinley McKinley Investment Group • Robert McLane Merrill Lynch • James McLaughlin Merrill Lynch • Mike McMahan Merrill Lynch • Daniel McMahon UVEST Financial Services • J Kevin Meaders Magellan Planning Group • Tim Medley Medley & Brown • Jerry Medved Citi Family Office • Richard Mercil Merrill Lynch • Gerald J Mershon The International FX Group • Jonathan Metcalfe Merrill Lynch • P. Chris Mickel Valeo Financial Advisors • Andrew Middleton Douglas M. Middleton • Frederick Miller Sensible Financial • Dave Milligan Colt Investment Services • Jeannene Mitchell Edward Jones • Dan Moisan Spraker, Fitzgerald, Tamayo & Moisan • Todd Moll Provenance Wealth Advisors • Art Molloy Capital Growth • Pablo Montero Bianchi DVFG Advisors • Jacquelin Moody Park Avenue Wealth Management • Alan Mooney Mooney Registered Investment Advisory • Christopher Moore Moore, Reibold and Anderson • Brandon Moss United Capital Financial Advisers • Todd Moss Greystone Financial Group • Wesley Mullins Ameriprise Financial • Paul Murans Merrill Lynch • Travis Musgrave Merrill Lynch • Keith Muth Virginia Asset Management • Charles Nash PFM Advisor • Donald Nelson Wachovia Securities • Thom Newcomb Ameriprise Financial • Christian Nimmo Wachovia Securities • Joe Nolan Robert W. Baird • Daniel Noven Noven Financial Group • Harris Nydick CFS Investment Advisory Services • David Obedin Renaissance Financial • Wally Obermeyer Obermeyer Asset Management Company • Daniel O'Connell Merrill Lynch • John Odell Arroyo Investment Group/Capital Research & Consulting • James O'Mealia Sunnymearth Asset Management • Alex Opolous Merrill Lynch • Thomas Orecchio Greenbaum & Orecchio • Glenn Pahnke Robert W. Baird • Matt Palmer The Joseph Group Capital Management • Carlo Panaccone Navigation Group (broker is LPL Financial) • Rocco Papandrea Merrill Lynch • Cathy Pareto Investor Solutions • Donald Eric Park Steamboat Financial Group • Tray Parks Merrill Lynch • Sheryl Patterson Wedbush Morgan Securities • Robert Pennartz Financial House • David Penniall Penniall & Associates • Martin Pernoll Bay Mutual Financial • Fred Pierce The Pierce/Kyle Group at Smith Barney • George Pierce George R. Pierce & Associates • Paul Pignone Boston Retirement Advisors • Paul Pitsironis Janney Montgomery Scott • Bryan Place Place Financial Advisors • David Polstra Brightworth • Steven Pomeranz Steven L. Pomeranz Financial Management • Herbert (Bert) Ponder Merrill Lynch • Kristine Porcaro Lexington Wealth Management • Tom Posey Posey Capital Management • John Prokop RegentAtlantic Capital • Scott Pyle Pyle/Cunningham Wealth Management Group • Jeffery Quesenberry Edward Jones • William Ramsay Financial Symmetry • Lagrand Redfield Asset Management Group • Kevin Reid Merrill Lynch • Anthony Reilly Ascend Advisory Group • James Reilly RegentAtlantic Capital • Eric Remjeske Devenir • David Reppas Citi Smith Barney • Christopher Rich RMR Financial Advisors • William Riley Raymond James & Associates • Rick Rodgers Rodgers & Associates • Joseph Romano III Merrill Lynch • E. Jeffrey Roof Roof Advisory Group • Evan Roth BBR Partners • Harvey Rowen Starmont Asset Management • Sheryl Rowling Rowling, Dold & Associates • Brett Rubinson Veritable LP • Alejandro Rubinstein Citi Smith Barney • David B. Russell Merrill Lynch • James Russo Altrius Capital Management • William T. Ryan Ryan Financial Advisors • Frederick Sadallah Merrill Lynch • Michael Saitoh Manufacturers Bank • Nanette Salley-Gudaitis U.S. Trust, Bank of America Private Wealth Management • Chris Sanchez LPL Financial Services • Melinda Sander Morgan Stanley • Bruce Sandry Merrill Lynch • Jonathan Satovsky Satovsky Asset Management • Howard Schachter Edward Jones • Ken Schapiro Condor Capital Management • Robert Schein Morgan Stanley • Vincent Schiavi Schiavi & Dattani • Gordana Schifanelli Merrill Lynch • Vicki Schultz Schultz Financial Group • Gary Schwarz Citi Smith Barney • Patrick Schwarz Citi Smith Barney • Dana Scott Edward Jones • David Scott Sunrise Advisors • Mark Scribner Proactive Wealth Management Group • Marc Scudillo Amper Financial Services • Jeff Seavey SunTrust Private Wealth Management • Joseph Seidler Wachovia Securities • Thomas A. Seiler Citi Smith Barney • Pat Severo RBC Dain Rauscher • Joel Shaps Bedrock Capital Management • Jonathan Sharbani Morgan Stanley • Mark Sheptoff Mark Sheptoff Financial Planning • Joshua Shulman Wachovia Securities • Brian Silkworth Silkworth & Associates • Gregory Simakas Citi Smith Barney • Bradley R. Sissons Edward Jones • Robert Skinner Merrill Lynch • John Skittone Wachovia Securities • Jared Smith Wachovia Securities • Terry Smith Merrill Lynch • Hank Smitty Merrill Lynch • Howard Sontag Sontag Advisory • Radon Stancil Diversified Estate Services • Brad Stark Mission Wealth Management • Bill Staton Staton Financial Advisors • Michael Steiner RegentAtlantic Capital • David Stellmach Merrill Lynch • John R. Stevens Wilbanks Securities • Susan Stevens Stevens Portfolio Design • David Stewart Vintage Capital Advisors • Richard A. Stone Salient Wealth Management • Glen Strauss Wachovia Securities • Steven Strauss Droms Strauss Advisors • Erik Strid Wachovia Securities Strid Wealth Management • Luis Strohmeier AXA Advisors • Andrew Sukhin Citi Smith Barney • Kevin Supka LPL Financial Services • Michael Swenson Private Banking and Investment Group at Merrill Lynch • Christopher Swink Wachovia Securities • Christopher Tate Merrill Lynch • Carolyn Taylor Weatherly Asset Management • Investment Team Osborne Partners Capital Management • Bryan Thaler Van Sant & Mewshaw • Scott Thomas Ashworth Advisors • Benjamin Tobias Tobias Financial Advisors • Richard Todd Innovest Portfolio Solutions • Robert Topping Covenant Wealth Advisors • Duke Tran Merrill Lynch • John Trott Valeo Financial Advisors • Jake Turner Merrill Lynch • Paul Urbanek Morgan Stanley • Donald Van De Steene A.G. Edwards • Christopher Van Slyke Capital Financial Advisors • David Vargo Varbeco Wealth Management • Bob Wacker R. E. Wacker Associates • Wayne Wagner, Jr. Covenant Asset Management • Mitchell Walk Asset Management Partners • Robert Walsh Lighthouse Financial Advisors • Dale Walters Keats, Connelly & Associates • David Ward Ameriprise Financial • Mark Wardzinski Raymond James & Associates • Max Wasserman Merrill Lynch • Derrick Watts Morgan Stanley • Terry Webb Jolley Asset Management • Curt Weil Lasecke Weil Wealth Advisory Group • Kathelen Weinberg Edward Jones • Steven Weinstein Altair Advisers • Eric Weiss Brightscape Investment Centers • Anthony Welch Sarasota Capital Strategies • Daniel Wells Continental Investors • Jason Wenk Retirement Wealth Advisors • Steve Wenstrup Tillar-Wenstrup Advisors • Greg Werlinich Werlinich Asset Management • Ronald West West Financial Services • Robert Westrick WNA Wealth Advisors • Chris Wheaton Litman/Gregory Asset Management • Jeff White American Financial Management Group • Kevin G. White W The Real Estate Company • Craig Wiggins CenTrust Wealth Management • Dan Wilburn RB Smith Co • Brett Wilder Financial Management Group • David Wilder Financial Management Group • Luke Wiley Merrill Lynch • Peter Wilhoit Merrill Lynch • Lambert Willett JJB Hillard WL Lyons • Chris Williams Citi Smith Barney • John C. Williams Citi Smith Barney • Mark Willoughby Greenbaum & Orecchio • Steven Wilson Capital Advisers • Stephen Wilt Merrill Lynch • Richard Wimbish Kensington Investment Counsel • Preston Wines Edward Jones • Thomas Winter Citi Smith Barney • Michael Witt Wachovia Securities • Bob Wood Wachovia Securities • Emily Wood Grimes & Company • Timothy Woodall Merrill Lynch • Ian Yankwitt Tortoise Investment Management • Daniel Yasharel NWF Advisory • Cheryl Young Ameriprise Financial • Mike Young Iowa State Bank & Trust • Paul Yurachek Gurtz, Yuracek and Associates • Matthew Zaft Merrill Lynch • Richard Zinman Citi Smith Barney • Carl Zuckerberg Relyea Zuckerberg Hanson •

Top Advisers 2008

Gala Dinner

Guest Speaker

John Zogby, President of Zogby International in New York, NY



John Zogby, President and CEO of Zogby International, remains by all accounts the hottest pollster in the United States today.

"All hail Zogby, the maverick predictor who beat us all," proclaimed the Washington Post in November 1996 after Zogby alone called that presidential election with pinpoint accuracy. In the recent razor-thin 2000 elections, daily national tracking polls conducted by Zogby International in the last few weeks foretold a tightening of the race for president while nearly all other polling

firms projected an easy victory for Gov. George W. Bush.

Since 1996, Zogby has polled for Reuters News Agency, the largest news agency in the world, and in 2000 to 2004, polled for NBC News, the network news watched by most Americans. His many clients include MSNBC, CNBC, the New York Post, Fox News, Knight-Ridder Newspapers and Gannett News Service, as well as television stations throughout the U.S.

Zogby regularly appears on all three nightly network news programs plus NBC's "Today Show," ABC's "Good Morning America" and is a frequent guest for Fox News and MSNBC special programs, along with CNBC's "Hardball with Chris Matthews. He is the author of a forthcoming portrait of the new American consumer, which will be published by Random House in 2008.

Zogby holds degrees in history from Le Moyne College and Syracuse University. He has taught history for 25 years. In addition he is a member of the Board of Trustees of Le Moyne College. He received the distinguished Alumni Award in June 2000, and In 2005, he was awarded Honorary Doctorate Degrees from State University of New York and the Graduate School of Union University. Mr. Zogby is also a Senior Advisor at the Kennedy School of Government at Harvard.

Evening Agenda

6:15pm-7:00pm

Cocktail reception: Lounge – 9th floor

7:00pm-10:15pm

Dinner: Main dining room – 11th floor

Dinner Program

7:15pm-7:30pm

Welcome

7:30pm-8:15pm

Guest speaker: John Zogby

8:15pm-9:15pm

Dinner served

9:15pm-9:45pm

Community service recognition

9:45pm-10:15pm

Coffee and dessert

Menu

Field greens and endive salad with creamy chive and buttermilk dressing

Stuffed breast of chicken with asparagus, fontina and roasted pepper, fennel cream

Espresso chocolate granache cake

Coffee and tea

Community Service Recognition

The Reuters AdvicePoint Community Service Awards recognize financial advisers who have demonstrated extraordinary individual dedication to non-profit organizations in their local communities. The key characteristics that are sought are individual involvement, community-based service and high impact in bettering the lives of those in challenging life situations.

Barry Glassman is a financial adviser at Cassaday & Co. in McClean, VA.

Barry was the driving force behind the Race for Hope, which has become the largest gathering of brain tumor patients and their families in the world. Race for Hope now attracts over 6000 supporters and over 200 volunteers from across the country and has raised over \$5.4 million to benefit brain tumor research and to support brain tumor patients.

Stephen Cohn is a partner with Sage Financial Group in Conshohocken, PA.

Stephen is a board member of Alex's Lemonade Stand Foundation. The Foundation's mission is to raise money and awareness for pediatric cancer causes. Before she lost her own fight with childhood cancer, Alex took the very simple idea of a lemonade stand and combined it with the cause of pediatric cancer. Alex's spirit has inspired over 8,000 Alex's Lemonade Stands across the country and raised over \$12 million for pediatric cancer research.

a special thanks to our sponsor

Linsco/Private Ledger Corp. (LPL) is committed to providing its financial advisors with the tools they need to offer the highest quality of independent investment advice. LPL has ranked first among independent broker/dealers for 12 consecutive years by *Financial Planning Magazine* (June 1996-2007, based on revenues). With over 2,200 staff members headquartered in Boston, San Diego and Charlotte, LPL offers non-proprietary investment products, unbiased research and wealth management services to retail clients and the clients of its 725 financial institutions through more than 10,000 advisors nationwide. LPL financial advisors manage assets totaling more than \$165 billion for their clients. For additional information about LPL, visit www.lpl.com.

