

**Justin Houchens**  
**AM Tier 1 - Territory 1**

Allstate Financial Services, LLC  
Annex Wealth Management, LLC  
Axtella  
Buckingham Strategic Partners  
Cary Street Partners  
Cerity Partners, LLC  
Fidelity  
Focus Financial Partners  
Founders Financial Securities, LLC  
Frost Bank  
Goldman Sachs Wealth Services, L.P.  
KeyBank, NA  
Neuberger Berman Group LLC  
PNC Bank, National Association  
Private Advisor Group  
RBC Capital Markets, LLC  
Sequoia Financial Group, LLC  
The Bessemer Group, Incorporated  
United Capital Financial Advisors LLC  
Wealth Enhancement Group  
WSFS Bank

**Lisamarie Roberto**  
**AM Tier 1 - Territory 2**

BMO Bank N.A.  
CapFinancial Partners, LLC (dba CAPTRUST Financial Advisors)  
Choreo, LLC  
Cresset Asset Management, LLC  
Dynasty Financial Partners LLC  
Equitable Advisors, LLC  
Equity Services, Inc.  
HighTower Holding, LLC  
Homrich Berg  
IFP Advisors, Inc. d/b/a Independent Financial Partners  
New York Life Insurance Company  
New York Life Insurance Company - Agency  
Old National Bank  
Principal Life  
Ronald Blue Trust, Inc.  
Savant Wealth Management  
Synovus Securities, Inc.  
The Northern Trust Company  
VALIC Financial Advisors, Inc.  
VestGen Wealth Partners  
Wells Fargo Bank, N.A.  
XY Planning Network, LLC

**Shannon Granahan**  
**AM Tier 1 - Territory 3**

Apollon Wealth Management  
Brown Brothers Harriman & Co.  
Cambridge Investment Research, Inc.  
CIBC Private Wealth Group, LLC  
First Horizon Bank  
Integrated Wealth Concepts, LLC  
Lincoln Investment Planning, LLC  
LPL Financial Corporation  
MAI Capital Management, LLC  
Modera Wealth Management  
OnePoint BFG Wealth Partners  
Raymond James & Associates, Inc.  
Regions Bank  
RFS Opco LLC d/b/a Rockefeller Capital Management  
Robert W. Baird & Co. Incorporated  
The Glenmede Trust Company, N.A.  
Valeo Financial Advisors, LLC  
Valmark Securities, Inc.  
Wealthspire Advisors LLC

**Liem Nguyen**  
**AM Tier 1 - Territory 4**

Allworth Financial  
Ameritas Investment Co.  
Aspiriant  
Beacon Pointe Advisors, LLC  
Cain Watters & Associates, PLLC  
Capital Group Companies Global  
Carson Wealth  
Carson Wealth Buckhead  
Carson Wealth Foxborough  
Carson Wealth Management Group  
Carson Wealth Minneapolis  
Cetera Financial Group, Inc.  
Composition Wealth, LLC  
CWM, LLC  
EP Wealth Advisors, LLC  
Lido Advisors, LLC  
Lincoln Financial Advisors  
M Holdings Securities, Inc.  
Mercer Global Advisors, Inc.  
Mutual Advisors, LLC  
Osaic Wealth, Inc.  
Pacific Capital Resource Group, Inc.  
Prime Capital Investment Advisors  
Pure Financial Advisors, Inc.  
SageView Advisory  
Soltis Investment Advisors  
The AmeriFlex Group  
United Planners  
World Investment Advisors

**Open**  
**AM Tier 1 - Territory 5**

CC Services, Inc.  
Citizens Securities, Inc.  
Corient Advisors  
Credent Wealth Management, dba CX Institutional, LLC  
Everence Trust Company  
Fifth Third Bank  
Hantz Financial Services, Inc.  
Horner, Townsend & Kent, LLC  
J.W. Cole Financial, Inc.  
Johnson Financial Group  
JPMorgan Chase Bank, NA  
Kestra Investment Services, LLC  
Mariner Wealth Advisors  
Mass Mutual  
Merit Financial Advisors  
Moneta Group Investment Advisors, LLC  
RFG Advisory  
Sanctuary Wealth Group, LLC  
Summit Financial, LLC  
Transamerica Financial Advisors  
Triad Partners  
UMB Bank, n.a.