

Account Manager Tier 2 Regions



Director, Advisor Sales

Caroline Grasso



(610) 684-1100 x 4437



CGrasso@emoneyadvisor.com



Manager, Advisor Sales

Tim Konrad



(484) 291-5908



tkonrad@emoneyadvisor.com

Territory 1

Larry Romano

(610) 596-9799

larryr@emoneyadvisor.com

Territory 2

Julie Walker

(267) 651-2170

jcarr@emoneyadvisor.com

Territory 3

Eric Murphy

(267) 641-8021

emurphy@emoneyadvisor.com

Advance Capital Management
Advisors Capital Management
AE Wealth - Top Level
Alliance Benefit Group, LLC
Altfest Personal Wealth Management
Andersen Tax LLC
Apella Capital
Balefire, LLC
Bank of Ann Arbor
Boulay Financial Advisors, LLC
Capital Investment Advisors, LLC
Capstone Financial Advisors
Crewe Advisors
Dakota Wealth Management
Destination Wealth Management
Eversource Wealth Advisors, LLC
Exencial Wealth Advisors
F.L. Putnam Investment Management Company
Feltz WealthPlan
First Citizens Bank
First Pacific Financial
Gilbert and Cook, Inc.
IEQ Capital, LLC
Journey Strategic Wealth LLC
Mason Investment Advisory Services
Mission Wealth Management
Nicolet Wealth Management
Packerland Brokerage Services LLC
Pathstone (2)
Peapack Gladstone Bank
Perigon Wealth Management, LLC
RWA Wealth Partners, LLC
Savvy Wealth, Inc
Summit Financial Strategies, Inc.
TCI Wealth Advisors
Tolleson Private Wealth Management, LP
US Capital Wealth Advisors
USA Financial Securities, LLC. - Top Level
Waldron Private Wealth
Winthrop Wealth Management

Abacus Wealth Partners
Alerus Financial, NA
Allegheny Financial Group
Alliance Global Partners - Top Level
AlphaCore Capital LLC
Arkadios Capital - Top Level
Carnegie Capital Asset Management, LLC
City National Rochdale, LLC
Colliers Securities LLC
Connecticut Wealth Management, LLC
Csenge Advisory Group - Top Level
Fifr, Inc.
FMC Group Holdings LP
Foster Group
GC Wealth Management RIA, LLC
Gerber Kawasaki Wealth & Investment Management
Henssler Financial
HUB Investment Partners
Innovia Wealth, LLC
Invst
JMG Financial Group, Ltd
Johnson Investment Counsel, Inc.
Level Four Advisory Services
Maia Wealth
Plancorp
Rehmann Financial
Robertson Stephens Wealth Management, LLC
Simon Quick Advisors LLC
Snowden Capital Advisors LLC
State Bankshares, Inc.
Steward Partners Global Advisory, LLC
Summit Financial Group, LLC
Summit Global Investments, LLC
Veranovia OSJ Services
Verdence Capital Advisors
Vicus Capital, Inc.
Vivaldi Capital Management
Waverly Advisors
Wescott Financial Advisory Group LLC

&Partners
Advisory Alpha, LLC - Top Level
Altium Wealth Management
Altus Wealth Management
Aprio Wealth Management, LLC
Asset Preservation Wealth and Tax
Assured Partners Investment Advisors, LLC
B. Riley Wealth Management
Bremer Trust, National Association
Busey Bank
Cedrus
Clearstead Advisors LLC
Coldstream Wealth Management
Compass Ion Advisors
Constellation Wealth Advisors
Creative Financial Designs - Top Level
CWA Asset Management Group, LLC
David Vaughan Investments, LLC
Embree Financial Group
Evercore Wealth Management, LLC
Fidelis Capital Partners, LLC
Greenleaf Trust
Hamilton Capital
Hightower Signature Wealth
Indivisible Partners
IronBridge Wealth Counsel
Ledyard Financial Advisors
Lexington Financial Life Management, LLC
Liberty Group, LLC
Linscomb Wealth
Matson Money, Inc.
Mesirow Financial Investment Management, Inc.
NewEdge Wealth
North Berkeley Wealth Management
NorthRock Partners, LLC
One Capital Management, LLC
ORG Partners LLC
Private Wealth Asset Management
SignatureFD
The Huntington National Bank
TruWealth Advisors
Zions Bancorp