Account Manager Tier 2 Regions

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Territory 1

SDR: **Richard Marshall**
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- 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

Territory 2

SDR: **Rose McWilliams**
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- 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

Territory 3

SDR: **Conor Dotson**
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- &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