

# 2<sup>nd</sup> Annual All-Star Research Manager Team Planned



SHREWSBURY, N.J., February 29, 2012 -- *Financial Advisor* and *Private Wealth* magazines plan to accept nominations this spring for their second all-star research managers team in conjunction with their conference for research managers at financial services firms.

The 2<sup>nd</sup> Annual Fiduciary Gatekeeper Research Manager Summit <http://www.famag.com/firms> will be held October 10-12 at the Hyatt Regency Boston and will provide research professionals the chance to meet in small settings with leading investment managers from around the country.

“Our inaugural Fiduciary Gatekeeper summit in Boston was a resounding success and was a platform for highlighting the inaugural *Financial Advisor/Private Wealth* Due Diligence/Research Manager All Star Team,” said David Smith, group publisher of Charter Financial Publishing Network (CFPN). From a field of almost 600 nominations, the research managers chosen for the 2011 team included:

- **RegentAtlantic Capital, Morristown, N.J.**

Chris Cordaro, Chief Investment Officer, Andy Kapyrin, Director of Research and Brian Kazanchy, Investment Committee Chair

- **Break Through Advisers, Macomb, Mich.**

Todd Pack, Chief Executive Officer

- **The Center For Financial Planning, Southfield, Mich.**

Melissa Joy, Partner

- **Commonwealth Financial Network, Waltham, Mass.**

Fred DeBaets, Senior Fixed Income Analyst, Simon Heslop, Director of Asset Management and W. Bradford McMillan, Chief Investment Officer

- **Financial & Investment Management Advisors, Covington, La.**

Scott Bordelon, Chief Executive Officer

- **Libertas Wealth Management, Dublin, Ohio**

Adam Koos, President

- **Morgan Stanley Smith Barney, Purchase, N.Y.**

Peter Kokenos, Director of Mutual Fund Due Diligence

- **Potomac Wealth Advisors, Rockville, Md.**

Mark Avallone, President

The 2011 winners were highlighted in an article <http://www.famag.com/component/content/article/9446.html?issue=183&magazineID=1&Itemid=27> in the January 2012 issue of *Financial Advisor* magazine.

The nomination process for the 2012 all-star team will begin in early June. We will once again solicit nominations from our Summit sponsors, as well as the asset management community at large, and advisors from RIA, IBD, Bank, Regional and Wirehouse firms. Information on the nomination process will be posted on the Websites of both *Financial Advisor* and *Private Wealth* magazines. An article on the research managers chosen for the 2012 all-star team will be featured in the October 2012 issue of *Financial Advisor* and will be announced and featured at the Boston Summit.

“We expect the summit to attract more than 200 leading fiduciaries for two days of presentations focused on the investment capabilities and insights of a select group of investment management firms,” Smith said. “The goal of the summit is to streamline the traditional due diligence path by enhancing access, insight and interaction in a collegial educational setting and empower decision makers.”

*Financial Advisor* is a monthly magazine read by more than 90,000 independent advisors and has been rated the most widely read publication for independent reps and RIAs. *Private Wealth* is a bi-monthly magazine with a 30,000 circulation that exclusively targets advisors, service providers and other centers of influence that cater to the financial, legal, insurance/risk management and lifestyle demands of the ultra-affluent. CFPN also produces Webinars <http://www.fa-mag.com/webcasts/webcasts-archive.html> and conferences <http://www.fa-mag.com/events.html> for financial service industry professionals.

For more information on the nomination process, contact Jessica Fontaine at 732.450.8866 or [jfontaine@fa-mag.com](mailto:jfontaine@fa-mag.com).

For more information on the Fiduciary Gatekeeper Summit, contact group publisher, David Smith at 732.450.8866, ext. 26 or [dsmith@fa-mag.com](mailto:dsmith@fa-mag.com).