



**ALM's INVESTMENT ADVISOR REVEALS THE 'MOST INFLUENTIAL' PEOPLE IN THE
INVESTMENT ADVISORY WORLD**

***Exclusive interviews and insights available in the May issue of Investment Advisor
and online throughout the month on ThinkAdvisor.com***

NEW YORK – May 2, 2016 – ALM's *Investment Advisor*, the leading publication for independent and independent-minded investment advisors and financial planners, has announced the 14th annual IA 25: the 25 most influential people in and around the advisor community. *Investment Advisor's* editorial staff selected these honorees for the impact they have had and will continue to have on investing, practice management, technology and psychology, and the regulatory universe in which all advisors operate.

This year's list is unique in that the honorees aren't necessarily household names, yet they wield a tremendous amount of influence and are charting a path for the investment advisory industry of the future. "In every organization, in every industry there are influential people who nevertheless fly under the radar," said Jamie Green, editor-in-chief of *Investment Advisor*. "This year, we seek to honor those individuals who may not have a CEO or chairman's title but who know advisors well and quietly and effectively provide advisors with the tools and insights they need to grow and compete."

The IA 25 profiles will appear in the May issue of *Investment Advisor*. Additional coverage and complete profiles of the 14th Annual IA 25 honorees will be available throughout May on ThinkAdvisor.com.

This year's IA 25 Honorees are:

Tech Leaders

- Eric Clarke, *Orion Advisor Services*
- Stuart DePina, *Envestnet | Tamarac*
- Naureen Hassan, *Morgan Stanley*
- Neesha Hathi, *Charles Schwab & Co.*
- Ed O'Brien, *eMoney Advisor*
- Clara Shih, *Hearsay Social*
- Jon Stein, *Betterment*

Advocates and Educators

- Laurie Belew, *FPA NexGen*
- Marty Bicknell, *Mariner Holdings*
- Kol Birke, *Commonwealth Financial Network*
- Fred Reish, *Drinker, Biddle & Reath*



- Mark Kantrowitz, *Cappex*
- Cam Marston, *Generational Insights*
- Marilyn Mohrman-Gillis, *CFP Board*
- Jim O’Sullivan, *High Frequency Economics*
- Lex Sokolin, *Vanere/NewstEgg Wealth*

Regulators

- Thomas Perez, *Department of Labor*
- David Grim and Stephen Luparello, *SEC*
- Jane Jarcho, *SEC*

Advisor Partners

- Colleen Bell, *Cambridge Investment Research*
- Jason Carroll, *Live Oak Bank*
- Lori Hardwick, *Pershing*
- Kate Healy, *TD Ameritrade Institutional*
- Chris Paulitz, *Financial Services Institute*
- Richard Sincere, *Sincere & Co.*

About *Investment Advisor* and the Investment Advisor Group

With a circulation of 100,000, *Investment Advisor* is now in its 36th year of serving independent and independent-minded investment advisors and financial planners across the United States through its monthly magazine and online at ThinkAdvisor.com. The Investment Advisor Group of ALM consistently produces the premier digital and print news, analysis and resources that the community of professional financial advice-givers needs to serve clients, stay compliant and maximize growth.

About ALM

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Customers use ALM solutions to discover new ideas and approaches for solving business challenges, connect to the right professionals and peers creating relationships that move business forward, and compete to win through access to data, analytics and insight. ALM serves a community of over 6 million business professionals seeking to discover, connect and compete in highly complex industries.

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