

WEALTH MANAGERS

WEALTH MANAGEMENT FIRMS

Rank	Executive Name Title, Company	Address Phone	Designations Licenses	Specialties
1	Joseph D. Wirbick President, Sequinox	941 Wheatland Ave., Suite 301 Lancaster, PA 17603 717-397-7957	IAR, RR Series 6, Series 63, Series 65	Working with retirees
2	Kevin Hart Kornfield President, Kornfield Investment Management	2137 Embassy Drive, Suite 105 Lancaster, PA 17607 717-392-0002	DNR	DNR
3	Kenneth L. Eshleman Principal & President, EHD Advisory Services Inc.	115 E. King St. Lancaster, PA 17602 717-390-4308	CFP* Series 6, Series 7, Series 24, Series 63, Series 65	Wealth management, financial planning
4	Norman LaPorte Managing Director, LaPorte Asset Management, LLC	525 N. 12th St., Suite 201 Lemoyne, PA 17043 717-730-9631	DNR	DNR
5	E. Jeffrey Roof President, Roof Advisory Group Inc.	507 N. Front St. Harrisburg, PA 17101 717-260-9281	Series 65	DNR
6	Patrick Cloonan Vice President, Securities, Sequinox	941 Wheatland Ave., Suite 301 Lancaster, PA 17603 717-397-7957	CFP* Series 7, Series 66, Life/Health Insurance	Working with retirees
7	Anthony M. Conte Financial Advisor, The Conte Browne Group, LLC	209 Market St. Camp Hill, PA 17011 717-975-8800	Series 6, Series 63, Series 65, Series 7, Life/Health & Property/Casualty Insurance	DNR
8	Frank A. Conte Managing Partner, The Conte Browne Group, LLC	209 Market St. Camp Hill, PA 17011 717-975-8800	ChFC*, CLU* Series 6, Series 63, Series 65, Series 7, Life/ Health & Property/Casualty Insurance	Financial planning, wealth preservation
9	Bradley R. Newman Financial Planner, Roof Advisory Group Inc.	507 N. Front St. Harrisburg, PA 17101 717-260-9281	CFP* Series 65	DNR
10	Michael Zimmerman Financial Advisor, Sequinox	941 Wheatland Ave., Suite 301 Lancaster, PA 17603 717-397-7957	IAR, RR Series 6, Series 63, Series 65	Working with retirees
11	Jessica Malone VP - Private Banking Relationship Manager, Clermont Wealth Strategies	200 N. Third St., P.O. Box 1189 Harrisburg, PA 17101 717-255-7573	DNR	DNR
12	Kenneth A. Norman VP - Relationship Manager, Clermont Wealth Strategies	1 Penn Square, P.O. Box 7989 Lancaster, PA 17604 717-291-2727	CFP*	Financial, estate, tax and retirement planning
13	Dennis R. Browne Managing Partner, The Conte Browne Group, LLC	2009 Market St. Camp Hill, PA 17011 717-975-8800	CMFC* Series 7, Series 24, Series 65, Life/ Health & Property/Casualty Insurance	DNR
14	Donald R. Gross Jr. President, Gross Investments	26 W. Orange St. Lancaster, PA 17603 717-299-4423	CFA	DNR
15	Kimberly A. Lutes Financial Advisor, Waddell and Reed, Inc.	4230 Crums Mill Road, Suite 200 Harrisburg, PA 17112 717-541-9606	AAMS	Retirement planning for PA state employees and teachers
16	Rick Rodgers President, Rodgers & Associates	647 E. Roseville Road Lancaster, PA 17601 717-560-3800	CFP*, CRC*, CRPC*	Retirement planning
17	Stephen Wenzel Vice President, Susquehanna Trust & Investment Company	1570 Manheim Pike, P.O. Box 3300 Lancaster, PA 17604 717-735-8759	DNR	Retirement planning for PA state employees and teachers
18	Sarah Young Fisher President, Kuntz Leshner Capital LLC	1800 Fruitville Pike, P.O. Box 8408 Lancaster, PA 17604 717-399-1700	CAP*, CASL*, CFP*, ChFC*, EA	DNR
19	John J. Fabian Jr. Senior Vice President, Morgan Stanley Smith Barney	214 Senate Ave., Seventh Floor Camp Hill, PA 17011 717-730-1800	Licensed Investment Broker	Money management, municipal bonds
20	Damien Lynch Partner, The Financial Advisory Group	43 Wynthre Brooke Drive York, PA 17403 717-741-3665	CFP* Series 7, Series 66	DNR

KEY	AAMS	Accredited Asset Management Specialist	ChFC*	Chartered Financial Consultant	EA	Enrolled Agent
	CAP*	Chartered Advisor in Philanthropy	CLU*	Chartered Life Underwriter	IAR	Investment Advisory Representative
	CASL*	Chartered Advisor for Senior Living	CMFC*	Chartered Mutual Fund Counselor	RR	Registered Representative
	CFA	Chartered Financial Analyst	CRC*	Certified Retirement Counselor		
	CFP*	Certified Financial Planner	CRPC*	Chartered Retirement Planning Counselor		

Rank	Company Name Website	Address	Phone
1	Fulton Financial Advisors/Clermont Wealth Strategies www.fultonfinancialadvisors.com	1 Penn Square, P.O. Box 4887 Lancaster, PA 17604	717-291-2616
2	Sequinox www.sequinox.com	Locations in Harrisburg and Lancaster	717-397-7957
3	EHD Advisory Services Inc. www.ehdadvisory.com	115 E. King St. Lancaster, PA 17602	717-390-4308
4	The Conte Browne Group, LLC www.contebrowne.com	209 Market St. Camp Hill, PA 17011	717-975-8800
5	LaPorte Asset Management LLC www.laporteam.com	525 N. 12th St. Lemoyne, PA 17043	717-730-9630
6	Morgan Stanley Smith Barney www.morganstanleysmithbarney.com	Locations in Camp Hill, Carlisle and Lancaster	check website
7	Kornfield Investment Management www.kornco.com	2137 Embassy Drive Lancaster, PA 17603	717-392-0002
8	Roof Advisory Group Inc. www.roofadvisory.com	507 N. Front St. Harrisburg, PA 17101	717-260-9281
9	PNC Wealth Management www.pnc.com	Locations in Camp Hill and Lancaster	888-762-6226
10	Wells Fargo Advisors www.wellsfargo.com	Locations in Harrisburg and Lemoyne	check website
11	Susquehanna Trust and Investment Company www.susquehanna.net	26 N. Cedar St. Lititz, PA 17543	717-625-6260
12	Waddell and Reed, Inc. www.waddell.com	Locations in Harrisburg, Mechanicsburg and York	888-WADDELL
13	RBC Wealth Management www.rbcwealthmanagement.com	Locations in Lancaster, Lemoyne and York	check website
14	Ameriprise Financial Services Inc. www.ameriprise.com	Locations in Duncannon and Elizabethtown	check website
15	M&T Bank - Trust and Wealth Management www.mtb.com	Locations in Harrisburg and York	800-724-2440
16	Rodgers & Associates www.rodgers-associates.com	647 E. Roseville Road Lancaster, PA 17601	717-560-3800
17	TEAM Financial Managers www.teamfinancialmanagers.com	800 Corporate Circle, Suite 106 Harrisburg, PA 17110	717-540-7807
18	Merrill Lynch Wealth Management www.totalmerrill.com	Locations in Camp Hill, Lancaster and York	800-MERRILL
19	ParenteBeard Wealth Management Group www.parentebeard.com	Locations in Hanover, Lancaster, Reading and York	check website
20	Gross Investments www.gross-investments.com	26 W. Orange St. Lancaster, PA 17603	717-299-4423
21	Kuntz Leshner Capital LLC www.klcinvest.com	1800 Fruitville Pike Lancaster, PA 17604	717-394-5666
22	Hershey Trust Company www.hersheytrust.com	100 E. Mansion Road Hershey, PA 17033	717-534-3215
23	BNY Mellon Wealth Management www.bnymellon.com	Locations in Elizabethtown, Harrisburg, Lancaster and York	check website
24	Centric Bank www.centricbank.com	4320 Linglestown Road Harrisburg, PA 17112	717-657-7727
25	Select Asset Management & Trust Company www.selectasset.com	4718 Old Gettysburg Road, Suite 405 Mechanicsburg, PA 17055	717-972-1300