



**BENJAMIN F. EDWARDS & CO.**  
INVESTMENTS *for* GENERATIONS

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## **Benjamin F. Edwards & Co. Adds Kansas City Suburb to List of Branch Locations**

*Office is the firm's 25th nationally and second in Kansas  
Chicago-area office also adds 30-year independent*

**(ST. LOUIS, August 31, 2012)** – Leawood, Kan., a Kansas City suburb, is the site of the latest branch office for brokerage firm [Benjamin F. Edwards & Co.](http://Benjamin F. Edwards & Co.), company officials announced today. The office, which opens with seven employees, is the firm's 25th nationally.

At the same time, the firm's Chicago-area location in Wheaton added a financial services veteran, who had previously operated his own independent broker-dealer for more than 30 years.

“Adding these five financial consultants to our organization and opening this office makes it an exciting time for our entire organization,” said Benjamin F. (Tad) Edwards IV, founder, chairman, CEO and president of the St. Louis-based brokerage. “Best of all, these individuals share our commitment to putting our clients first and look forward to working with a firm that combines the freedom of working as an independent with the support, expertise, and product breadth that Benjamin F. Edwards & Co. offers.”

Joining the Kansas City area location and transferring from Wells Fargo Advisors are the following professionals who represent more than 50 years of combined industry experience:

**Ingram / Liberty Wealth Management Group:** The group is comprised of L. Grant Ingram, CFP<sup>®</sup>, Gary Liberty, CFP<sup>®</sup>, and Monet Matthews. The group offers more than 35 years of combined industry experience, many years of which were spent with A.G. Edwards. At Benjamin F. Edwards & Co., both Ingram and Liberty hold the title Senior Vice President – Investments and are CERTIFIED FINANCIAL PLANNER<sup>™</sup> professionals, a designation they each earned in 2006. Matthews will continue to assist Ingram and Liberty with their client responsibilities as a Registered Financial Associate, as she has since joining the group in 2007.

**Brian Wiklund, CFP<sup>®</sup>, Senior Vice President – Investments:** Wiklund has worked for 16 years as a financial consultant in Kansas City and earned his CERTIFIED FINANCIAL PLANNER<sup>™</sup> designation in 2006. Prior to his career as a financial consultant, Wiklund worked for A.G. Edwards at the company's headquarters in St. Louis. Julie Keithline, who has worked in the financial services industry since 2000, will work with Wiklund as a Registered Financial Associate.

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**John Diederich, Financial Consultant:** Diederich began his career in the brokerage industry in 2001 at the Overland Park, Kan. office of A.G. Edwards. He is a graduate of Kansas State University.

**Lori Cox, Assistant Branch Manager:** Cox has 18 years of experience in the brokerage industry, the last three of which were spent as the Kansas City Market Operations Manager for Wells Fargo Advisors, where she supported 125 financial consultants and 75 employees in five branches.

**Tom Morrison joins firm's Wheaton office as vice president – investments and financial consultant**

Joining the firm's Wheaton, Ill., location and the Hanson-Fisher Wealth Management Group is Thomas Morrison, CFP®. Previously, Morrison was the principal of Morrison Financial Services, Ltd., an independent financial planning practice he founded in 1983, which helped individuals, families, and small business owners with their financial plans.

He closed his financial planning practice and joined Benjamin F. Edwards & Co. as a Vice President – Investments in order to take advantage of the firm's product and service depth, as well as its reputation for outstanding client service.

Morrison brings with him more than 30 years of investment experience, having also previously worked in public accounting and as a corporate controller before moving into the brokerage industry. He earned his CERTIFIED FINANCIAL PLANNER™ professional designation in 1987. In addition, he holds a CPA certificate.

"I loved my years as an independent financial planner because I had the freedom to work with my clients in the manner I thought best," said Morrison. "The great thing about joining Benjamin F. Edwards & Co. is that I don't see that changing. I am confident my clients will appreciate this firm's commitment to client-first service, especially given the level of personalized support and expertise we gain from our Home Office."

Transitioning with Morrison is Terry Trauner, who will continue to assist him with his client work. She began her financial services career in 2007 when she joined Morrison Financial Services and will continue to assist Morrison with his client duties.

"We're thrilled to have Tom and Terry bring their experience to Benjamin F. Edwards & Co.," said David W. Hanson, Branch Manager and Managing Director – Investments for the Benjamin F. Edwards & Co. Wheaton location. "Although Tom could have merged his financial planning practice with, or been acquired by another financial services firm, he instead chose to close that practice and join us and be a part of our organization. He and Terry will be real assets for us as we continue to develop our presence in Wheaton and across the country."

**About Benjamin F. Edwards & Co.**

With a tagline of "Investments for Generations" and a company logo anchored by the Edwards crest, Benjamin F. Edwards & Co. is headquartered in St. Louis, Mo. The firm was founded in 2008 by Benjamin F. (Tad) Edwards IV, the great-great-grandson of Albert Gallatin Edwards, the founder of brokerage firm A.G. Edwards. Currently, the firm now has 25 branches in 15 states and more than 200 employees.

A subsidiary of Benjamin Edwards, Inc., Benjamin F. Edwards & Co. is a full-service brokerage and a Registered Investment Adviser, which offers a wide array of financial products and advisory services to its clients and financial consultants. For more information about Benjamin F. Edwards & Co., please visit [www.benjaminfedwards.com](http://www.benjaminfedwards.com) and follow the company on Twitter (@GrowWithBFEC).