



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

For more information, contact:  
Margaret Welch at 314-703-1215 or  
[margaret@mgwcommunications.com](mailto:margaret@mgwcommunications.com)

One North Brentwood Boulevard  
Suite 850  
Saint Louis, Missouri 63105  
Telephone 314-726-1600  
Facsimile 314-726-1601  
[benjaminfedwards.com](http://benjaminfedwards.com)

*Member of SIPC Member of FINRA*

## **FOR IMMEDIATE RELEASE**

### **BENJAMIN F. EDWARDS & CO. CATCHES ITS NEXT GROWTH WAVE IN PANAMA CITY**

**Florida location is the firm's 21<sup>st</sup> and its first in Florida**

**(ST. LOUIS, September 19, 2011)** – [Benjamin F. Edwards & Co.](http://benjaminfedwards.com), the St. Louis-based brokerage, added its fifth branch in less than two months with the opening of its Panama City, Fla., location, officials at the firm announced today. The Florida office opening gives the company a presence in 14 states.

Two long-time panhandle-area financial consultants, Malissa (Libby) Romack, CFP®, and Kathleen Duncan, AAMS®, are anchoring the new location, along with Lolita Nettles, a senior registered financial associate, who will assist them with their client responsibilities. All three are moving from Wells Fargo Advisors and had previously worked for A.G. Edwards.

“We are thrilled to be the first branch location in Florida and are very much looking forward to introducing our clients – and all panhandle-area investors – to the special, client-friendly business approach for which Benjamin F. Edwards & Co. is known,” said Libby Romack, who joins as branch manager and a vice president – investments. “Kathleen and I knew this was the right move for us and our clients, given the firm’s high-level of personalized service and its breadth of products and services.”

Romack started in the financial services industry with the Panama City branch of A.G. Edwards in 1993, moved into client account management in 2001, and quickly became the branch manager only a year later. In 2006, she earned her Certified Financial Planner™ designation. Today, she concentrates on building long-term relationships with her clients so that she can work with them to develop a financial strategy that meets their financial goals and objectives.

Kathleen Duncan also joins Benjamin F. Edwards & Co.’s Panama City office as a vice president – investments. Duncan began her financial services career in 1997 after working for six years in the printing industry. Four years later, she earned her Accredited Asset Management Specialist<sup>SM</sup> designation from the College for Financial Planning.

“Both of these individuals bring with them deep client relationships which they have worked hard to build over many years,” said Benjamin F. (Tad) Edwards IV, founder, chairman and CEO of Benjamin F. Edwards & Co. “They work with their clients to help them develop an investment approach and wealth management strategy that meet their clients’ needs.”

-more-

### **Lean Home Office Infrastructure**

Pershing LLC provides back office and trade processing support for Benjamin F. Edwards & Co., while the company's Home Office Operations team acts as a liaison with Pershing on behalf of the firm's financial consultants.

"This arrangement helps keep our financial advisors focused on providing outstanding service to their clients, while our Home Office personnel take care of responding to questions from the field and handling the day-to-day issues with Pershing," said Edwards.

On the technology front, the brokerage offers Pershing's industry-leading NetX360 workstation and then provides its financial consultants with an integrated assortment of best-in-class tools like Albridge for performance reporting and MoneyGuidePro for financial planning. Both were named top solution providers in *Financial Planning* magazine's 2010 survey of technology providers.

"Using Pershing and leveraging top technology providers gives us the opportunity to offer state-of-the-art back office and technology tools in a scalable fashion that will not only accommodate our growth as a firm, but also provide for continuous upgrades and improvements without our firm having to build a personnel infrastructure to do so," said Edwards. "This approach frees up our corporate resources to handle what we do best – provide outstanding service to our financial consultants and their clients and invest in the development of our branch network."

Year to date, the firm has added 29 financial consultants and now employs a total of 197. "Our structure is flexible, which enables us to add offices as opportunities present themselves and also accommodates industry and competitive adjustments that we need or would like to make," Edwards said.

### **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.

In addition to the new location in Panama City, Fla., the firm has offices in Peoria, Springfield, Decatur, Wheaton, Galesburg, LaSalle-Peru, Ill.; Danbury and Hamden, Conn.; Atlanta, Ga.; Wichita, Kan.; St. Louis and Springfield, Mo.; the Minneapolis-St. Paul, Minn., suburb of Edina; Red Bank, N.J.; White Plains, N.Y.; Highlands, N.C.; Mentor, Ohio; Chattanooga, Tenn., Bluefield, Va.; and Madison, Wis.

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).

# # #