



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

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## **FOR IMMEDIATE RELEASE**

### **Benjamin F. Edwards & Co. Opens Offices in Mississippi; *Also Adds Advisors to Illinois, Maryland, and Missouri Offices***

**(ST. LOUIS, February 16, 2016)** – Gulfport and Hattiesburg, Miss., are the latest office additions for the St. Louis-based investment firm [Benjamin F. Edwards & Co.](http://Benjamin F. Edwards & Co.), company officials announced today. The Mississippi locations are the firm’s first in the Magnolia State. In addition, the company announced that four advisors joined its existing office in Wheaton, Ill., one advisor came aboard in Baltimore, Md., and two advisors joined its Clayton, Mo. office.

Collectively, the 13 new advisors represent \$784 million in assets under management. With the addition of the new offices in Mississippi, the firm now has 53 offices and a presence in 25 states.

“As market volatility continues, clients need sound, reasonable investment advice now more than ever,” said Benjamin F. (Tad) Edwards IV, chairman and CEO of Benjamin F. Edwards & Co. “The advisors joining us today bring extensive financial services experience, and are empowered with the freedom to select from products and services that best fit their clients’ goals and objectives.”

Joining the firm are the following (by location):

#### **Gulfport, Miss.**

Opening and working from the firm’s new location in Gulfport are the following individuals:

**Bridget L. Weatherly, CFP®, Branch Manager, Senior Vice President – Investments:**  
Weatherly brings with her almost 20 years of experience in the financial services industry, and concentrates on estate planning and wealth management. She earned her CERTIFIED FINANCIAL PLANNER™ certification in 2006.

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**Tom L. McCormick, CFP®, Vice President – Investments:** McCormick began his financial services career in 1977, and earned his CERTIFIED FINANCIAL PLANNER™ certification in 2008.

**P. Michael Pela, CFP®, Vice President – Investments:** Pela entered the securities industry in 1989, and received his CERTIFIED FINANCIAL PLANNER™ certification in 2007. He focuses on advisory portfolios, education and retirement planning strategies.

**Hal Kaigler, CFP®, Associate Vice President – Investments:** Kaigler began his financial services career in 1995, and received his CERTIFIED FINANCIAL PLANNER™ certification in 2005.

**Angela Wolfe, AAMS®, Associate Vice President – Investments:** Wolfe brings with her more than 30 years of experience in the financial services industry, and earned her ACCREDITED ASSET MANAGEMENT SPECIALIST<sup>SM</sup>, or AAMS®, certification from the College for Financial Planning in 2008.

With the exception of Wolfe, who joins Benjamin F. Edwards & Co. from Edward Jones, all of the Gulfport advisors are transferring from Wells Fargo Advisors.

In addition, the firm announced the hiring of Kimberly Sylvia, senior financial associate, and Jessica Hammons, financial associate, who will both assist the advisors with their office management and client service responsibilities.

#### **Hattiesburg, Miss.**

**Howell Taylor, CFP®, Branch Manager, Senior Vice President – Investments:** Taylor is a 40-year financial services veteran, and concentrates on investment strategies and retirement planning. In 2002, he earned his CERTIFIED FINANCIAL PLANNER™ certification from the College for Financial Planning. He too transfers from Wells Fargo Advisors.

Making the move with Taylor is Betty Hagg, who joins as a senior financial associate and will assist with client service responsibilities.

#### **Wheaton, Ill.**

Joining Benjamin F. Edwards & Co. from Morgan Stanley are three individuals who comprise The Schulte Wealth Management Group as well as financial services veteran, Maurice Mathy:

**Mary L. Schulte, CFP®, Senior Vice President – Investments:** Schulte is a 30-year veteran of the financial services industry, and formed The Schulte Wealth Management Group when her son, T.J. Cleland, and son-in-law, J. Randolph Sidio, joined her practice. She concentrates on retirement planning, and earned her CERTIFIED FINANCIAL PLANNER™ certification from the College for Financial Planning in 2001.

**T.J. Cleland, Associate Vice President – Investments:** Cleland began his financial services career in 2005 and focuses on portfolio management for The Schulte Wealth Management Group.

**Randy Sidio, Financial Consultant:** Sidio concentrates on business development for The Schulte Wealth Management Group and started his financial services career in 2008 after graduating from Aurora University.

**Maurice Mathy, Vice President – Investments:** Mathy entered the securities industry in 1988, and concentrates on business owner services and retirement planning.

The group is working temporarily from the Benjamin F. Edwards' Wheaton location until construction on their Naperville, IL, office is completed.

#### **Baltimore, Md.**

**Rick Faby, Branch Manager, Senior Vice President – Investments:** Faby has worked in the financial services industry since 1980 and specializes in retirement planning and wealth management. He transfers from Ameriprise Financial Services.

The Baltimore office, which opened in 2013, now employs a total of six, including four financial advisors.

#### **Clayton, Mo.**

**C. Kevin Coulter, Associate Vice President - Investments:** Coulter entered the securities industry in 1981, and concentrates on fixed income strategies and portfolio management.

**Bill Ferry, CDFIA®, Associate Vice President – Investments:** Ferry began his financial services career in 1986, and concentrates on developing investing strategies for women and wealth management. He earned his CERTIFIED DIVORCE FINANCIAL ANALYST® designation in 2011 from the Institute for Divorce Financial Analysts.

Both advisors transfer from Oppenheimer. With the latest additions, total employment in the Clayton office is 10, including eight financial advisors.

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

With a tagline of “Investments for Generations”, Benjamin F. Edwards & Co. is headquartered in St. Louis, Mo. The firm was founded in 2008 by Benjamin F. (Tad) Edwards IV and currently has 53 branch offices in 25 states and more than 400 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, advisory and investment banking services to its clients and financial advisors. For more information about Benjamin F. Edwards & Co., please visit the firm's corporate website, [benjaminfedwards.com](http://benjaminfedwards.com), [GetInAtBenEdwards.com](http://GetInAtBenEdwards.com) for advisors, or follow the company on [Twitter.com/GrowWithBFEC](https://twitter.com/GrowWithBFEC).

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