



**BENJAMIN F. EDWARDS®**  
INVESTMENTS *for* GENERATIONS®

One North Brentwood Boulevard  
Suite 850  
Saint Louis, Missouri 63105  
Telephone 314-726-1600  
Toll Free 855-382-1600  
[benjaminfedwards.com](http://benjaminfedwards.com)

*Member of SIPC Member of FINRA*

For more information, contact:  
Rob Donaldson at 314-660-6739 or  
[rob.donaldson@benjaminfedwards.com](mailto:rob.donaldson@benjaminfedwards.com)

## **FOR IMMEDIATE RELEASE**

### **Benjamin F. Edwards Opens 95<sup>th</sup> Location; First Branch in Rhode Island**

**ST. LOUIS**, May 23, 2024 – St. Louis-based financial services firm [Benjamin F. Edwards](http://benjaminfedwards.com) recently opened its 95<sup>th</sup> location, this one in Newport, RI, company officials announced today. The new branch welcomes two new advisors, James Tollefson, CFP® and Eric Brown, CFP®. Collectively, they bring over an amazing 72 years of experience in the financial service industry, joining the firm from A.G. Edwards/Wachovia/Wells Fargo. Also joining them is Senior Registered Financial Client Associate, Stacey Tollefson.

This opening marks the firm's first branch in Rhode Island and is located at 272 Valley Road, Suite# 1, Middletown, RI 02842. The phone number is 401-239-0233 or toll-free 833-509-4100. You can also reach them via email at [james.tollefson@benjaminfedwards.com](mailto:james.tollefson@benjaminfedwards.com) or at [eric.brown@benjaminfedwards.com](mailto:eric.brown@benjaminfedwards.com).

"We take enormous pride in welcoming these new advisors to our ever-growing Edwards family," said Tad Edwards, chairman and CEO of Benjamin F. Edwards. "We are equally as thrilled in adding a branch to the state of Rhode Island in the wonderful community of Newport."

James is dedicated to helping clients understand the financial planning process and how investments help them reach their goals. As an advisor, Eric prioritizes ensuring his clients maintain their financial course for the long haul.

"What truly energizes me is witnessing the fruition of years of planning, particularly when I see my clients' children successfully attending college, funded through the 529 plans we set up for them years ago", Brown said.

Edwards has continued to expand its presence across the United States by adding experienced advisors to its full-service, national wealth-management firm and its registered investment advisor (RIA), Edwards Wealth Management. Including Rhode Island, the firm now has a presence in 33 states.

#### **About Benjamin F. Edwards**

With a legacy spanning 137 years over six generations of the Edwards family, Benjamin F. Edwards today is an entrepreneurial wealth management enterprise welcoming client-first, full-service financial

2024-1278 Exp. 05/31/2025

advisors to join our firm. Advisors at Edwards seek to render solid investment advice while helping clients develop a plan to reach their goals. The growing national firm is now in 33 states with 95 locations, with over \$41 billion in assets under management. It remains true to its Golden Rule roots with regard to treatment of clients, financial advisors, employees, and all partners we work with. The home office in St. Louis knows advisors by name and eschews call centers to get advisors' questions answered. Leveraging the firm's distinguished heritage and vision for the future, those who desire can become advisors of the firm's broker-dealer, Benjamin F. Edwards. Alternatively, they can choose an independent affiliation with the firm's registered investment advisor (RIA) Edwards Wealth Management. Edwards's strong fiscal foundation and timeless values enable it to be a firm of "Client-First Service Second-to-None," offering friendly support and thoughtful, tailored investment and planning advice to its treasured clients who make it all possible. We have zero debt and are committed to staying independent through future generations.