



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

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FOR IMMEDIATE RELEASE

Eight Advisors Join Benjamin F. Edwards & Co.; Bring More Than \$600 Million in Assets

ST. LOUIS, July 10, 2018 – Eight financial advisors recently joined various offices of financial services firm Benjamin F. Edwards & Co. The transfers bring with them client assets totaling \$616 million, company officials announced today. With the additions, assets under management for the St. Louis-based firm stand at nearly \$24 billion.

“Our client-centric approach, our dedication to unparalleled service, and our vast product and service platform continue to drive advisor interest and client satisfaction,” said Martin “Marty” Altenberger, executive vice president and director of branches for Benjamin F. Edwards & Co. “The support we offer to our advisors enables them to focus on what really matters – our clients, as we help them meet their financial goals and objectives.”

Joining the company are the following financial advisors and their office locations:

Wheaton, Ill.

David Kohlmeyer, CFP®, Senior Vice President – Investments: Kohlmeyer brings with him more than 25 years of experience helping people prepare and execute their financial plans. He earned his CERTIFIED FINANCIAL PLANNER™ certification from the College of Financial Planning in 2001. He moved to Edwards from Stifel Nicolaus.

Chandler, Ariz.

Herr Wealth Management

David Herr, CFP®, Vice President – Investments; and **Tyler Herr, Financial Advisor:**

Together, this father and son team have 40-years of combined financial services experience and concentrate on estate and retirement planning strategies, while also providing assistance to their clients as they identify, plan for, and pursue their financial goals. David earned his CERTIFIED FINANCIAL PLANNER™ certification in 2006. The team transfers from Wells Fargo Advisors.

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Birmingham, Ala.

Bill Raymon, CFP®, Vice President – Investments: Raymon began his financial services career in 1997 and earned his CERTIFIED FINANCIAL PLANNER™ certification in 2008. Previously, he worked for Wells Fargo Advisors.

Atlanta, Ga.

James W. (Jim) Garner, Vice President – Investments: Garner has more than 30 years of experience in financial services, and concentrates on trust, estate, and general financial planning strategies. He moved to Benjamin F. Edwards & Co. from Wells Fargo Advisors.

Woodstock, Ill.

James (Jim) Goehl, Vice President – Investments: With 32-years of experience in the financial services arena, Goehl joins Benjamin F. Edwards & Co. from Wells Fargo Advisors.

Galesburg, Ill.

Kevin Rodeffer, Associate Vice President – Investments: After working in personal banking for seven years, Rodeffer became a financial advisor concentrating in mutual fund portfolio construction and the use of annuity products in comprehensive financial plans. He joins Edwards from LPL Financial.

Sarasota, Fla.

Anthony K. (Tony) Swart, Financial Advisor: Specializing in retirement income planning and advisory portfolios, Swart moved to Benjamin F. Edwards & Co. from Sun Trust Bank.

About Benjamin F. Edwards & Co.

With a tagline of “Investments for Generations,” Benjamin F. Edwards & Co. is headquartered in St. Louis, Mo. Founded in 2008 by Benjamin F. (Tad) Edwards IV, the firm opened its first branch in 2009, and currently has 67 offices in 26 states and more than 500 employees.

A subsidiary of Benjamin Edwards, Inc., Benjamin F. Edwards & Co. is a full-service brokerage and a Registered Investment Adviser and 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, GetInAtBenEdwards.com for advisors, or follow the company on [Twitter.com/GrowWithBFEC](https://twitter.com/GrowWithBFEC).

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