

FPA

FINANCIAL
PLANNING
ASSOCIATION

GEORGIA

Partner Bios & Fun Facts



A member of the Financial Industry Regulatory Authority (FINRA) and the Securities Investor Protection Corporation (SIPC).

Inland Securities Corporation is the exclusive dealer manager for the public and private real estate investment programs sponsored by Inland Real Estate Investment Corporation and its affiliates.

FUN FACT Joe backpacked around the world for 6 months 30 years ago.



LRM stands for Legacy and Risk Management. We are an independent insurance consulting firm that works exclusively with fee-based and fee-only advisors. We exist to support the evolution of the RIA model in designing insurance-based estate, business and wealth protection strategies on behalf of financial advisors. We provide unbiased professional service, advice, and counsel to help you and your clients protect what matters most to them.

FUN FACTS Brad Uhl | Grew up in the golf cart community of Peachtree City, GA and am an avid golfer.

Mark Rosen | Pittsburgh resident and Steelers fan. Raised a city boy that loves working outdoors in the country.

Sean Link | Pittsburgh resident and is an Amateur Powerlifter.



A leading healthcare planning company used by forward-thinking advisors and their clients nationwide. Our groundbreaking platform puts first-of-its-kind Health Planning Analyses and an expert team of agents into the hands of advisors. This way, you are your clients' trusted source for guidance on their Medicare and health insurance decisions.

FUN FACT Cole recently did a complete renovation of his 100+ year-old house and serves on his church's worship team!

Partner Bios & Fun Facts



We build institutional-quality ETF solutions for all market environments, spanning high-conviction growth opportunities, durable core exposures, and alternatives. Founded in 2022, Tema is led by veterans of the ETF and global asset management industry, and backed by Index Ventures, Accel, and over a dozen financial services CEOs and fintech founders.

FUN FACT Mike Doran went to college with Jimmy Buffet's son. Mike loves to cook - his favorite thing to make is short-rib ragu with homemade pappardelle.



MIDLAND ADVISORY

We understand your commitment to your clients and your advisory practice. That's why we're designing cutting-edge solutions that help meet the needs of registered investment advisors (RIAs) and their clients solutions that help navigate market conditions, offer opportunity, and instill retirement confidence.

It's our dedication to long-term results that has helped propel our 115 years of financial strength, and what's now helping RIAs strengthen client trust with retirement risk mitigation - delivered by Midland National's advisory-designed lineup.

FUN FACT Len is part of the small percentage of adults who willingly wake up early, pay good money, to try to hit a 1.68-inch ball into a 4.25-inch hole hundreds of yards away... for fun.



We are dedicated to working with and learning from advisors like you. With over 30 years of experience serving independent advisors, we understand what it takes to help you meet your business goals.

FUN FACT Russ Kiefer live across the street from the largest film studio in North America

Partner Bios & Fun Facts



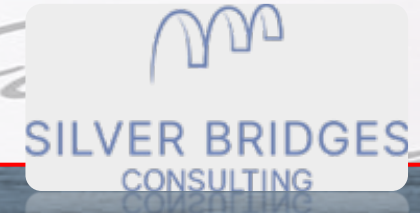
A leading provider of Defined Outcome ETFs and the creator of the first Buffer ETFs, launched in 2018. The firm specializes in outcome-oriented investment solutions designed to help advisors improve portfolio predictability, manage downside risk, and enhance asset allocation efficiency within an ETF structure. Innovator continues to expand its lineup with Buffer, Floor, and Managed Outcome strategies.

FUN FACT Tyson played College Basketball and takes his March Madness Brackets very seriously (He has not won his bracket since 2008).



A leading national reverse mortgage lender and servicer committed to providing financial advisors with the education and support needed to responsibly utilize home equity in retirement planning. The financial solutions Longbridge offers can help by giving clients options to improve flexibility, tax efficiency, and cash flow – while preserving other portfolio assets. Longbridge is a resource for advisors and their clients across the country, working with reputable firms that share our commitment to the highest ethical, regulatory, and customer service standards.

FUN FACT Mark enjoys spending time with his wife and three children. They love embarking on family adventures, including camping, fishing, hiking, and skiing. When he's not helping clients navigate mortgages, he's navigating mountain trails—preferably the snowy ones.



We are your concierge experts in navigating the complexities of senior living. We are dedicated advocates, focused on educating and empowering your clients to make informed decisions for themselves or a loved one.

Our mission is to simplify the process, bringing clarity and calmness to what can otherwise be a complicated journey.

FUN FACT Both Kristy and Ginger volunteer as puppy-raisers for Canine Companions. CCI is a national organization that enhances the lives of people with disabilities by providing highly trained service dogs at no charge to the recipient.

Partner Bios & Fun Facts



We provide nonbank financial companies with the people, processes and technology to meet their unique banking needs. Financial Advisors may offer a Securities-Backed Line of Credit (SBLOC) to clients from The Bancorp as a powerful lending solution that can allow individuals or entities to maintaining their portfolio while obtaining easy liquidity.

FUN FACT Greg Fat, Regional Director: Greg has traveled to over 20 countries and can get by in 4 different languages.

J.P.Morgan

ASSET MANAGEMENT

We believe investors deserve an expert global partner they can trust to step up and deliver strong outcomes. From the largest institutional investors around the world to financial advisors around the corner, our clients rely on the power of perspective to help build stronger portfolios and solve their toughest challenges.

Our perspective draws on knowledge earned over a century of investing through every market cycle. Today, with market intelligence trusted the world over, we offer deep, actionable insights. From our vantage point, we strive to see correlations others miss and seize opportunities that our global, connected view can deliver. To any challenge our clients face, we say, Let's Solve It.

FUN FACT Guy owns a bulk spring water facility in Blue Ridge, GA. The water from his natural springs ends up in bottles of national brands for distribution in the southeast united states.



SIMAPTIC is an AI-driven cybersecurity platform built by veteran cyber operators and security researchers who have trained professionals from the Department of Defense, Apple, Google, and Airbus. With deep expertise in offensive security and AI development, the team created SIMAPTIC to give Registered Investment Advisors an affordable, on-demand way to validate their security controls and meet SEC Regulation S-P compliance requirements without needing a dedicated security team.

Partner Bios & Fun Facts



A culture of academic inquiry has been Dimensional's bedrock from the start. Our firm is driven by an evidence-based approach, Nobel Prize-winning insights, and decades of expertise pursuing higher returns while maintaining low costs and diversification.

Our investment process reflects years of innovation and refinement, and this has translated into better returns for investors.

Our commitment to research, rigor, and the pursuit of truth has helped transform the industry toward more transparent, data-driven solutions for investors. That commitment continues to propel Dimensional forward today.

FUN FACT: Skylar Liang is getting married five days before the Annual Regional Symposium!



Simplicity is the leading partner for advisors, financial institutions, and consumers by delivering the best combination of wealth accumulation and financial protection products that meet the needs of a consumer-oriented holistic financial plan. As one of the fastest growing partnerships in the financial services industry, Simplicity offers an unrivalled array of tools and technologies to grow and protect wealth, which can be accessed through affiliation, outsourcing, or joining the partnership. In an ever-changing environment, Simplicity's commitment to working in our clients' best interest is unwavering and has always been anchored to our commitment to Education, Value, and Partnership.

FUN FACT: Kelli grew up in Dalton, Ga and played collegiate golf. Kelli now resides here in Buckhead with her husband, two children, and three dogs.