

WEALTH MANAGERS

WEALTH MANAGEMENT FIRMS

Rank	Prev. Rank	Executive Name Title, Company	Address Phone	Designations Licenses	Specialties
1	NR	Samuel S. Lindenberg President TEAM Financial Managers	800 Corporate Circle, Suite 106 Harrisburg, PA 17110 717-540-7807	CFP®, CRPC®, CLU	Individual financial planning
2	NR	James Dailey Chief Investment Officer TEAM Financial Managers	800 Corporate Circle, Suite 106 Harrisburg, PA 17110 717-540-7807	CFA®	Global macro absolute return investment strategy
3	18	Sarah Young Fisher President Kuntz Leshner Capital LLC	1800 Fruitville Pike, P.O. Box 8408 Lancaster, PA 17601-8408 717-399-1700	CAP®, CASL®, CFP®, ChFC, CLU, EA	Trustee, investments
4	11	Jessica Malone VP Relationship Manager - Private Banking Fulton Financial Advisors/Clermont Wealth Strategies	200 N. Third St., P.O. Box 1189 Harrisburg, PA 17108 717-255-7573		Banking, lending
5	NR	Andrew Steele Senior Investment Consultant, Members 1st Federal Credit Union/Wealth Management Group	5000 Louise Drive Mechanicsburg, PA 17050 717-795-6051	Series 6, 7, 63, 97, Life/Health Insurance	Insurance and bank brokerage
6	NR	Joseph DeMuro VP of Financial Planning & Investments TEAM Financial Managers	800 Corporate Circle, Suite 106 Harrisburg, PA 17110 717-540-7807	CFP®	Individual income tax returns, retirement planning, investment review
7	3	Kenneth L. Eshleman Principal & President EHD Advisory Services Inc.	115 E. King St. Lancaster, PA 17602 717-390-4308	CFP® Series 6, 7, 63, 65	Wealth management, financial planning
8	14	Donald R. Gross Jr. President Gross Investments	26 W. Orange St. Lancaster, PA 17603 717-299-4423	CFA®	Investment, individual stock and individual bond management
9	NR	Edward P. Gormley President and CEO Susquehanna Financial Advisors LLC	4999 Louise Drive, Suite 101 Mechanicsburg, PA 17050 717-506-2100	CFP®, CPA Series 7, 24, 63; Life/Fixed Annuities, Accident/Health, Variable Life/Variable Annuities Insurance	Asset, retirement, estate and tax planning
10	7	Anthony M. Conte Financial Advisor, Portfolio Manager The Conte Browne Group LLC	2009 Market St. Camp Hill, PA 17011 717-975-8800	CFP® Series 6, Series 7, Series 63, Series 65, Life/Health, Disability, Property, Casualty Insurance	Trust services, risk management, securities analysis
11	1	Joseph D. Wirbick President Sequinix	941 Wheatland Ave., Suite 301 Lancaster, PA 17603 717-397-7957	IAR, RR Series 6, Series 63, Series 65	Working with retirees
12	4	Norman La Porte Managing Director & Senior Financial Advisor La Porte Asset Management LLC	525 N. 12th St. Lemoyne, PA 17043 717-730-9630		Financial services, private portfolio management
13	NR	Diana L. Mohr Vice President The Financial Advisory Group	45 Wynthre Brooke Drive York, PA 17403 717-741-3665	CFP® Series 6, 7, 63, Life Insurance	Financial planning, retirement planning
14	8	Frank A. Conte Managing Partner The Conte Browne Group LLC	2009 Market St. Camp Hill, PA 17011 717-975-8800	ChFC, CLU Series 6, 63, 65, 7, Life/Health, Property, Casualty Insurance	Financial planning, wealth preservation
15	20	Damien P. Lynch Partner The Financial Advisory Group	43 Wynthre Brook Drive York, PA 17403 717-741-3665	CFP® Series 7, 66, Life/Health Insurance	Investment management, financial planning
16	2	Kevin Hart Kornfield President Kornfield Investment Management	2137 Embassy Drive, Suite 105 Lancaster, PA 17603 717-392-0002	RIA Series 4, 5, 7, 24, 27, 52, 53, 63, 65	Wealth management, retirement income planning
17	NR	Brad D. Stein President & Registered Principal The Financial Advisory Group	45 Wynthre Brooke Drive York, PA 17403 717-741-3665	CFP® Series 7, 24, 63, 65	
18	12	Kenneth A. Norman Vice President - Relationship Manager Fulton Financial Advisors/Clermont Wealth Strategies	1 Penn Square, P.O. Box 7989 Lancaster, PA 17604 717-291-2727	CFP®	Estate, financial, tax and retirement planning; investment management, trust administration
19	NR	Kurt M. Schaffer First Financial Group	1869 Charter Lane, Suite 201 Lancaster, PA 17601 717-393-4465	CPA, PFS, RIA Series 6, 7, 63, 66, Life/Health, Disability, LTC Insurance	Investments, business succession and estate planning, executive benefit programs
20	NR	Jay Wise Senior Financial Advisor Northwest Savings Bank	2220 S. Queen St. York, PA 17402 717-747-8880	CFP, CLU Series 6, 26, 63, 7, Life, Accident, Health Insurance	Retirement planning, estate planning
21	NR	Corey L. Basehore Partner uFinancial	100 Corporate Center Drive, Suite 201 Camp Hill, PA 17011 717-763-7365	CFP®, ChFC®, CLU, IAR, RR Series 7	Wealth management and preservation; financial, retirement income, estate and charitable planning
22	9	Bradley R. Newman Financial Planner Roof Advisory Group Inc.	507 N. Front St. Harrisburg, PA 17101 717-260-9281	CFP®, IAR, RIA Series 65	Investment portfolio review, retirement analysis, college education funding, unique planning for clients in transition
23	NR	Charles A. Robson III Senior Vice President Fulton Financial Advisors/Clermont Wealth Strategies	200 N. Third St. Harrisburg, PA 17101 717-255-7544		Banking, wealth management
24	NR	Seth Arbogast Director of Financial Planning & Investments TEAM Financial Managers	800 Corporate Circle, Suite 106 Harrisburg, PA 17110 717-540-7807	CFP® Series 65	
25	NR	Timothy Wilkins Members 1st Federal Credit Union/ Wealth Management Group	2145 White St. York, PA 17404 717-854-1216, ext. 6654		

Rank	Prev. Rank	Company Name Website	Address	Phone
1	17	TEAM Financial Managers www.teamfinancialadvisors.com	800 Corporate Circle, Suite 106 Harrisburg, PA 17110	717-540-7807
2	NR	Members 1st Federal Credit Union/Wealth Management Group www.members1st.org	5000 Louise Drive Mechanicsburg, PA 17050	717-795-6051
3	21	Kuntz Leshner Capital LLC www.klcinvest.com	1800 Fruitville Pike Lancaster, PA 17604	717-399-1700
4	1	Fulton Financial Advisors/Clermont Wealth Strategies www.fultonfinancialadvisors.com	1 Penn Square, P.O. Box 4887 Lancaster, PA 17604	717-291-2616
5	NR	uFinancial www.finsvcs.com	100 Corporate Center Drive, Suite 201 Camp Hill, PA 17011	717-763-7365
6	4	The Conte Browne Group LLC www.contebrowne.com	209 Market St. Camp Hill, PA 17011	717-975-8800
7	NR	The Financial Advisory Group www.lpl.com	43 Wynthre Brook Drive York, PA 17403	717-741-3665
8	3	EHD Advisory Services Inc. www.ehdadvisory.com	115 E. King St. Lancaster, PA 17602	717-390-4308
9	NR	Susquehanna Financial Advisors www.sfausa.com	4999 Louise Drive, Suite 101 Mechanicsburg, PA 17050	717-506-2100
10	NR	First Financial Group www.firstfinancialgroup.com	1869 Charter Lane, Suite 201 Lancaster, PA 17601	717-393-7957
11	2	Sequinix www.sequinix.com	941 Wheatland Ave., Suite 301 Lancaster, PA 17603	717-397-7957
12	20	Gross Investments www.grossinv.com	26 W. Orange St. Lancaster, PA 17603	717-299-4423
13	NR	Ranker-Hanshaw Wealth Management www.ranker-hanshaw.com	801 E. Park Drive, Suite 103 Harrisburg, PA 17111	888-503-7186
14	5	La Porte Asset Management LLC www.laporteam.com	525 N. 12th St. Lemoyne, PA 17043	717-730-9630
15	7	Kornfield Investment Management www.kornfieldmanagement.com	2137 Embassy Drive, Suite 105 Lancaster, PA 17607	717-392-0002
16	8	Roof Advisory Group Inc. www.roofadvisory.com	507 N. Front St. Harrisburg, PA 17101	717-260-9281
17	10	Wells Fargo Advisors www.wellsfargoadvisors.com	3 Lemoyne Drive Lemoyne, PA 17043	717-761-7040
18	6	Morgan Stanley Smith Barney www.morganstanleysmithbarney.com	214 Senate Ave., Suite 700, Camp Hill, PA 17011 419 Village Drive, Suite 1, Carlisle, PA 17015	Camp Hill: 717-737-6500 Carlisle: 717-258-4363
19	NR	Northwest Savings Bank www.northwestsavingsbank.com	547 S. 10th St. Lebanon, PA 17042	717-270-2806, ext. 134
20	9	PNC Wealth Management www.pnc.com	101 North Pointe Blvd., 14th floor Harrisburg, PA 17105	888-762-6226
21	15	M&T Bank - Trust and Wealth Management www.mtb.com	213 Market St. Reading, PA 19603	800-724-2440
22	19	ParenteBeard Wealth Management Group www.parentebeardwm.com	1869 Charter Lane, Suite 301 Lancaster, PA 17601	717-393-7957
23	18	Merrill Lynch Wealth Management www.ml.com	96 S. George St., York, PA 17401 214 Senate Ave., Camp Hill, PA 17011 110 N. Duke St., Lancaster, PA 17602	York: 717-843-0011 Camp Hill: 717-975-4600 Lancaster: 717-295-5681
24	14	Ameriprise Financial www.ameriprise.com	30 D E. Roseville Road Lancaster, PA 17601	717-581-5888, ext. 118
25	NR	Edward Jones Investments www.edwardjones.com	1300 Market St. Lemoyne, PA 17043	717-731-5432

KEY	AAAMS®	Accredited Asset Management Specialist	ChFC®	Chartered Financial Consultant	IAR	Investment Advisory Representative
	CAP®	Chartered Advisor in Philanthropy	CLU®	Chartered Life Underwriter	PFS	Personal Financial Specialist
	CASL®	Chartered Advisor for Senior Living	CPA	Certified Public Accountant	RIA	Registered Investment Advisor
	CFA	Chartered Financial Analyst	CRPC®	Chartered Retirement Planning Counselor	RR	Registered Representative
	CFP®	Certified Financial Planner	EA	Enrolled Agent		

WEALTH MANAGERS

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Rank	Executive Name Title, Company	Address Phone	Designations Licenses	Specialties
1	Joseph D. Wirbick President, Sequinox	941 Wheatland Ave., Suite 301 Lancaster, PA 17603 717-397-7957	IAR, RR Series 6, Series 63, Series 65	Working with retirees
2	Kevin Hart Kornfield President, Kornfield Investment Management	2137 Embassy Drive, Suite 105 Lancaster, PA 17607 717-392-0002	DNR	DNR
3	Kenneth L. Eshleman Principal & President, EHD Advisory Services Inc.	115 E. King St. Lancaster, PA 17602 717-390-4308	CFP* Series 6, Series 7, Series 24, Series 63, Series 65	Wealth management, financial planning
4	Norman LaPorte Managing Director, LaPorte Asset Management, LLC	525 N. 12th St., Suite 201 Lemoyne, PA 17043 717-730-9631	DNR	DNR
5	E. Jeffrey Roof President, Roof Advisory Group Inc.	507 N. Front St. Harrisburg, PA 17101 717-260-9281	Series 65	DNR
6	Patrick Cloonan Vice President, Securities, Sequinox	941 Wheatland Ave., Suite 301 Lancaster, PA 17603 717-397-7957	CFP* Series 7, Series 66, Life/Health Insurance	Working with retirees
7	Anthony M. Conte Financial Advisor, The Conte Browne Group, LLC	209 Market St. Camp Hill, PA 17011 717-975-8800	Series 6, Series 63, Series 65, Series 7, Life/Health & Property/Casualty Insurance	DNR
8	Frank A. Conte Managing Partner, The Conte Browne Group, LLC	209 Market St. Camp Hill, PA 17011 717-975-8800	ChFC*, CLU* Series 6, Series 63, Series 65, Series 7, Life/ Health & Property/Casualty Insurance	Financial planning, wealth preservation
9	Bradley R. Newman Financial Planner, Roof Advisory Group Inc.	507 N. Front St. Harrisburg, PA 17101 717-260-9281	CFP* Series 65	DNR
10	Michael Zimmerman Financial Advisor, Sequinox	941 Wheatland Ave., Suite 301 Lancaster, PA 17603 717-397-7957	IAR, RR Series 6, Series 63, Series 65	Working with retirees
11	Jessica Malone VP - Private Banking Relationship Manager, Clermont Wealth Strategies	200 N. Third St., P.O. Box 1189 Harrisburg, PA 17101 717-255-7573	DNR	DNR
12	Kenneth A. Norman VP - Relationship Manager, Clermont Wealth Strategies	1 Penn Square, P.O. Box 7989 Lancaster, PA 17604 717-291-2727	CFP*	Financial, estate, tax and retirement planning
13	Dennis R. Browne Managing Partner, The Conte Browne Group, LLC	2009 Market St. Camp Hill, PA 17011 717-975-8800	CMFC* Series 7, Series 24, Series 65, Life/ Health & Property/Casualty Insurance	DNR
14	Donald R. Gross Jr. President, Gross Investments	26 W. Orange St. Lancaster, PA 17603 717-299-4423	CFA	DNR
15	Kimberly A. Lutes Financial Advisor, Waddell and Reed, Inc.	4230 Crums Mill Road, Suite 200 Harrisburg, PA 17112 717-541-9606	AAMS	Retirement planning for PA state employees and teachers
16	Rick Rodgers President, Rodgers & Associates	647 E. Roseville Road Lancaster, PA 17601 717-560-3800	CFP*, CRC*, CRPC*	Retirement planning
17	Stephen Wenzel Vice President, Susquehanna Trust & Investment Company	1570 Manheim Pike, P.O. Box 3300 Lancaster, PA 17604 717-735-8759	DNR	Retirement planning for PA state employees and teachers
18	Sarah Young Fisher President, Kuntz Leshner Capital LLC	1800 Fruitville Pike, P.O. Box 8408 Lancaster, PA 17604 717-399-1700	CAP*, CASL*, CFP*, ChFC*, EA	DNR
19	John J. Fabian Jr. Senior Vice President, Morgan Stanley Smith Barney	214 Senate Ave., Seventh Floor Camp Hill, PA 17011 717-730-1800	Licensed Investment Broker	Money management, municipal bonds
20	Damien Lynch Partner, The Financial Advisory Group	43 Wynthre Brooke Drive York, PA 17403 717-741-3665	CFP* Series 7, Series 66	DNR

KEY	AAMS	Accredited Asset Management Specialist	ChFC*	Chartered Financial Consultant	EA	Enrolled Agent
	CAP*	Chartered Advisor in Philanthropy	CLU*	Chartered Life Underwriter	IAR	Investment Advisory Representative
	CASL*	Chartered Advisor for Senior Living	CMFC*	Chartered Mutual Fund Counselor	RR	Registered Representative
	CFA	Chartered Financial Analyst	CRC*	Certified Retirement Counselor		
	CFP*	Certified Financial Planner	CRPC*	Chartered Retirement Planning Counselor		

Rank	Company Name Website	Address	Phone
1	Fulton Financial Advisors/Clermont Wealth Strategies www.fultonfinancialadvisors.com	1 Penn Square, P.O. Box 4887 Lancaster, PA 17604	717-291-2616
2	Sequinox www.sequinox.com	Locations in Harrisburg and Lancaster	717-397-7957
3	EHD Advisory Services Inc. www.ehdadvisory.com	115 E. King St. Lancaster, PA 17602	717-390-4308
4	The Conte Browne Group, LLC www.contebrowne.com	209 Market St. Camp Hill, PA 17011	717-975-8800
5	LaPorte Asset Management LLC www.laporteam.com	525 N. 12th St. Lemoyne, PA 17043	717-730-9630
6	Morgan Stanley Smith Barney www.morganstanleysmithbarney.com	Locations in Camp Hill, Carlisle and Lancaster	check website
7	Kornfield Investment Management www.kornco.com	2137 Embassy Drive Lancaster, PA 17603	717-392-0002
8	Roof Advisory Group Inc. www.roofadvisory.com	507 N. Front St. Harrisburg, PA 17101	717-260-9281
9	PNC Wealth Management www.pnc.com	Locations in Camp Hill and Lancaster	888-762-6226
10	Wells Fargo Advisors www.wellsfargo.com	Locations in Harrisburg and Lemoyne	check website
11	Susquehanna Trust and Investment Company www.susquehanna.net	26 N. Cedar St. Lititz, PA 17543	717-625-6260
12	Waddell and Reed, Inc. www.waddell.com	Locations in Harrisburg, Mechanicsburg and York	888-WADDELL
13	RBC Wealth Management www.rbcwealthmanagement.com	Locations in Lancaster, Lemoyne and York	check website
14	Ameriprise Financial Services Inc. www.ameriprise.com	Locations in Duncannon and Elizabethtown	check website
15	M&T Bank - Trust and Wealth Management www.mtb.com	Locations in Harrisburg and York	800-724-2440
16	Rodgers & Associates www.rodgers-associates.com	647 E. Roseville Road Lancaster, PA 17601	717-560-3800
17	TEAM Financial Managers www.teamfinancialmanagers.com	800 Corporate Circle, Suite 106 Harrisburg, PA 17110	717-540-7807
18	Merrill Lynch Wealth Management www.totalmerrill.com	Locations in Camp Hill, Lancaster and York	800-MERRILL
19	ParenteBeard Wealth Management Group www.parentebeard.com	Locations in Hanover, Lancaster, Reading and York	check website
20	Gross Investments www.gross-investments.com	26 W. Orange St. Lancaster, PA 17603	717-299-4423
21	Kuntz Leshner Capital LLC www.klcinvest.com	1800 Fruitville Pike Lancaster, PA 17604	717-394-5666
22	Hershey Trust Company www.hersheytrust.com	100 E. Mansion Road Hershey, PA 17033	717-534-3215
23	BNY Mellon Wealth Management www.bnymellon.com	Locations in Elizabethtown, Harrisburg, Lancaster and York	check website
24	Centric Bank www.centricbank.com	4320 Linglestown Road Harrisburg, PA 17112	717-657-7727
25	Select Asset Management & Trust Company www.selectasset.com	4718 Old Gettysburg Road, Suite 405 Mechanicsburg, PA 17055	717-972-1300