



U.S. Wealth Management Welcomes New Advisor Practices in Bethesda, MD and Lehigh Valley, PA to Platform; Reaches over \$600 Million in Total Recruited Advisory and Brokerage Client Assets

– New Additions Include Leading Advisory Firm Equity Planning Inc. –

Boston, MA – May 23, 2013 – U.S. Wealth Management (USWM) – an independent network of experienced wealth managers providing holistic financial advice and custom-tailored wealth planning strategies to retail and business clients – today announced that it has recruited two new independent financial advisory practices to its platform, including Equity Planning Inc. and a team of two advisors based in Lehigh Valley, Pennsylvania. The addition of the two practices to the U.S. Wealth Management platform brings the fast-growing firm’s total recruited advisory and brokerage client assets to more than \$600 million. USWM, which began the year with approximately \$350 million of recruited advisory and brokerage client assets, expects to exceed \$1 billion in total recruited advisory and brokerage client assets by this time next year. (Advisory assets are held by U.S. Financial Advisors LLC, the SEC-registered independent RIA firm of U.S. Wealth Management.)

Founded in 1963 and headquartered in Bethesda, Maryland, [Equity Planning Inc.](#) is led by veteran wealth manager [Marc S. Schliefer, CFP](#), and advises on approximately \$250 million in advisory and brokerage client assets. The practice offers fee and commission-based services to a diverse client base spanning multiple industries, and encompasses eight staff members in total. The team at Equity Planning Inc. orients its efforts around providing a comprehensive package of financial planning services and wealth management solutions to high net worth retail and business clients in over 40 states nationwide. In particular, Equity Planning Inc. focuses on strategies for clients that best enable asset value protection, savings and growth potential.

The advisory team in [Lehigh Valley](#), Pennsylvania is led by experienced advisors [Benjamin Haas](#) and [Christopher Sabosik](#). Haas and Sabosik specialize in providing customized, in-depth financial planning and wealth management solutions to retirees, pre-retirees and other individual investors in Pennsylvania and nationwide. The team offers both fee and commission-based services, and advises on approximately \$60 million in combined advisory and brokerage client assets. Haas and Sabosik’s practice will operate under the U.S. Wealth Management brand.



Equity Planning Inc. and the Lehigh Valley team will utilize LPL Financial, the broker-dealer for U.S. Wealth Management and largest independent broker-dealer in the nation*, for all commission-based securities activities. For all fee-based activities, both teams will work under U.S. Financial Advisors, LLC.

As part of its ongoing commitment to supporting both commission-based businesses and RIA firms, LPL Financial provided onsite transition assistance to both advisory teams and will be a key technology partner for them going forward. As a result, most of the two teams' RIA assets will be custodied with LPL Financial, although USWM maintains partnerships with major custodians throughout the financial services industry.

John P. Napolitano, Chief Executive Officer of U.S. Wealth Management, said, "We are delighted to welcome these two exceptional advisory practices to U.S. Wealth Management. By joining our platform, these experienced advisors – Marc Schliefer and his team at Equity Planning Inc., as well as Benjamin Haas and Christopher Sabosik – have further demonstrated the strength of U.S. Wealth Management's value proposition for independent advisors around the country, while extending our recent history of growth."

Marc Schliefer, President of Equity Planning Inc., said, "As Equity Planning Inc. celebrates its 50th anniversary, we are very excited to join the U.S. Wealth Management platform. USWM's strong practice management support and other services, as well as the asset management capabilities offered through USWM's SEC-registered RIA, U.S. Financial Advisors, LLC, will position us for ongoing growth and enable us to offer a broad range of tailored financial planning strategies while maintaining our independence."

Schliefer continued, "U.S. Wealth Management's relationship with LPL Financial, in particular, provides us with the national scale, unbiased research and comprehensive array of tools, resources and technology we need in order to continue to grow and strengthen our practice."

Benjamin Haas said, "U.S. Wealth Management has built an exceptional team that understands our desire for independence, while at the same time giving us access to a wide network of experienced professionals, excellent back and middle-office resources, a strong marketing presence and other tools that will help us – and our clients – pursue our goals for the future."



Bill Morrissey, Executive Vice President of Business Development at LPL Financial, said, “LPL Financial congratulates U.S. Wealth Management and these outstanding advisory teams on their new strategic partnerships. We are pleased to work with these excellent firms, and we look forward to helping them achieve their growth objectives in the years ahead.”

About U.S. Wealth Management

U.S. Wealth Management is an independent network of experienced wealth managers who provide holistic advice and custom-tailored strategies to manage their clients’ financial future. With over fifteen offices located nationwide, the wealth managers of the firm have a common focus – a personal interest in meeting all their clients’ investment, insurance, and retirement needs as they change throughout their lifetime.

With access to comprehensive resources including asset management / research, advanced technology and an expansive product platform, the wealth managers affiliated with U.S. Wealth Management serve their clients with the support of a dedicated team of experienced professionals who put the clients’ needs first.

For wealth managers, U.S. Wealth Management provides the full spectrum of resources necessary to advance the growth and value of their practices, providing true independence with structured support. The firm offers to wealth managers a culture of trust, support and accessibility, practice management and tailored coaching for growth, competitive payouts, advanced marketing support, and business succession planning. Visit uswealthmanagement.com to learn more.

About Equity Planning Inc.

Based in Bethesda, Maryland, Equity Planning Inc. has counseled high-net-worth clients in the three key areas of financial services—asset value protection, savings, and growth potential – since 1963. The firm provides a comprehensive package of financial planning services and wealth management solutions, including both fee and commission-based services, to high net worth retail and business clients in over 40 states nationwide. Visit equityplanning.com to learn more.

*Based on total revenues, Financial Planning magazine, June 1996-2012



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