



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

For more information, contact:  
Margaret Welch at 314-703-1215, or  
[margaret@mgwcommunications.com](mailto:margaret@mgwcommunications.com)

One North Brentwood Boulevard  
Suite 850

Saint Louis, Missouri 63105

Telephone 314-726-1600

Facsimile 314-726-1601

[benjaminfedwards.com](http://benjaminfedwards.com)

*Member of SIPC Member of FINRA*

## **FOR IMMEDIATE RELEASE**

### **Benjamin F. Edwards & Co. Opens Branch in Red Bank, N.J.**

*New office is the firm's 18<sup>th</sup> and first in the state of New Jersey;*

*Company to offer enhanced portfolio measurement tool;*

*Firm adds IRA and retirement plan expert*

**(ST. LOUIS, August 5, 2011)** – With the addition of five experienced financial services veterans – including two who have each served in branch leadership roles – [Benjamin F. Edwards & Co.](http://Benjamin F. Edwards & Co.) is opening a branch in Red Bank, N.J., today and establishing a presence in the Garden State, company officials announced. All are transferring from Wells Fargo Advisors and, collectively, represent 90 years of experience.

Leading the new office for the St. Louis-based firm as a senior vice president – investments and branch manager is Todd C. Leonhardt, CFP®. Leonhardt entered the securities industry in 1988. Before joining the A.G. Edwards Spring Lake branch in 1992, he opened and managed a branch in Edison, N.J., for his previous firm. He obtained his CFP® designation in 1999. In 2005, A.G. Edwards selected Leonhardt to open a new office in Red Bank, N.J., which, under his leadership, grew to employ 11 financial consultants and four financial associates. In early 2007, just prior to the Wachovia Securities (now Wells Fargo Advisors) acquisition of A.G. Edwards, Leonhardt assumed responsibility for the firm's Spring Lake location. After the merger, he was named Wall Complex Manager and continued his branch management duties for both locations. He stepped down as complex manager in March 2011.

Also joining the Benjamin F. Edwards & Co. Red Bank location as a senior vice president – investments is former long-time East Brunswick, N.J., branch manager Michael J. Doherty, CFP®. Doherty, a CPA, worked five years in public accounting before entering the securities industry in 1984. Joining A.G. Edwards in 1990, he became assistant manager in the Spring Lake office in 1994 and had been the manager of the company's East Brunswick location since 1998. Having earned his CFP® designation in 1991, Doherty will be focusing his time helping his clients with their growth and income needs.

In addition, James W. Ireland, CFP®, joins the firm as a financial consultant. Ireland started at A.G. Edwards in 1985. While able to address client needs from the basic to the complex, Ireland focuses on retirement planning. In addition to his professional responsibilities, Ireland is the president of the Point Pleasant Beach, N.J., Board of Education and has been a member of the board for 14 years.

Rounding out the office are Richard J. Niekrash as a senior registered financial associate and Robert T. Sim, CFP®, who will hold the title of registered financial associate. Both will assist Leonhardt, Doherty and Ireland with their client management responsibilities.

-more-

“Having such experienced and sound leadership anchor this branch will be a real asset for us as we work to develop our presence in the Garden State,” said Benjamin F. (Tad) Edwards IV, founder, chairman, CEO and president of Benjamin F. Edwards & Co. “This group’s collective enthusiasm for our client-first business model and strong ties with clients throughout the state put us on a strong footing.”

The office in Red Bank is the 18<sup>th</sup> in the country, giving the firm a branch presence in 12 states. It is also the fourth branch in the company’s eastern region and joins locations in White Plains, N.Y.; and Danbury and Hamden, Conn. The new Red Bank branch is conveniently located right off of the Garden State Parkway at 125 Half Mile Road, Suite 104. It offers easy access to parking.

“This firm is a perfect fit for us,” said Todd C. Leonhardt, CFP®, and senior vice president – investments and branch manager of the Red Bank location for the St. Louis-based brokerage firm. “Benjamin F. Edwards & Co. offers the robust selection of quality products and services our clients need, combined with the personalized service and attention that makes working and investing with this firm so pleasant and easy.”

Eastern Regional Manager and Senior Vice President J. William Forrester is pleased with the firm’s growth in the region but looks forward to adding more locations as opportunities present themselves.

“Our focus is not only on building the region and the firm, but it is also to make sure we bring aboard quality individuals who are driven first and foremost by a desire to provide excellent client service,” said Forrester. “We add personnel and offices carefully, making sure first that there is a cultural fit and that the proposed location makes economic sense.”

Forrester also pointed to the firm’s ability to offer its advisors the opportunity to use mobility devices – including iPads, BlackBerrys and others – to access the firm’s state-of-the-art technology platform as they serve their clients in the office or on the go.

“It’s a technology enhancement that appeals to quite a number of our advisors who want to meet with their clients on their clients’ terms – whether at their home, office, or over coffee,” Forrester added.

**Latest Technology Enhancement: Benjamin F. Edwards & Co. selects Albridge Solutions for portfolio measurement services**

Most recently, the firm selected Albridge Solutions, Inc. to provide an expanded suite of portfolio reporting tools, which will be rolled out to the company’s financial consultants in the fall. With the new tools, Benjamin F. Edwards & Co. financial consultants will be able to examine the performance of a client’s investment holdings by household, at the individual account level, or on a comprehensive portfolio basis.

Albridge Solutions, Inc., is an affiliate of Pershing LLC, a BNY Mellon company, and was named the top solution provider in the portfolio management technology category in Financial Planning’s 2010 survey of technology providers. MoneyGuidePro, which is also used by Benjamin F. Edwards & Co., also received high marks.

“At Benjamin F. Edwards & Co., part of our client-first service commitment is to provide our financial consultants with a fully accessible and integrated suite of tools to help their clients make informed investment decisions. The ability to access Albridge using mobile devices was a key factor in the decision,” said Christopher M. Keller, senior vice president and chief information officer for Benjamin F. Edwards & Co.

Keller emphasized the importance of using third-party vendors to the firm's overall technology strategy. "By using third-party vendors we are able to avoid the overhead and limitations of aging systems and can instead quickly move and adapt to the best practices being developed by others."

#### **IRA and Retirement Plan Expert Added to St. Louis Home Office Staff**

Theresa Fry, formerly a field consultant for State Farm Insurance, and a vice president and manager of IRA and distribution planning at A.G. Edwards (later Wachovia Securities), is the most recent addition to the Benjamin F. Edwards & Co. Home Office in St. Louis. She joins as a vice president and manager of IRA and retirement plans and works with the firm's financial advisors and clients on retirement planning matters.

Ms. Fry understands the field well, having served in a similar capacity during her 10 years at A.G. Edwards and later Wachovia Securities. In addition to her management responsibilities, Fry frequently served as the firm's spokesperson on retirement topics, appearing on CNBC and regularly quoted in national publications like *USA Today*, *Money*, and *BusinessWeek*.

#### **About Benjamin F. Edwards & Co.**

With a tagline of "Investments for Generations" and a company logo anchored by the Edwards family crest, Benjamin F. Edwards & Co. is headquartered in St. Louis, Mo. The firm was founded in 2008 by Benjamin F. (Tad) Edwards IV, the great-great-grandson of Albert Gallatin Edwards, the founder of brokerage firm A.G. Edwards. The company employs 185 people company-wide. Now with Red Bank, N.J., the firm has a total of four branches in its eastern region, including Danbury and Hamden, Conn. and White Plains, N.Y. In addition the company has 14 other offices in 9 states, including St. Louis and Springfield, Mo.; Highlands, N.C.; Atlanta, Ga.; Bluefield, Va.; Madison, Wis.; Mentor, Ohio; Wichita, Kan.; Chattanooga, Tenn.; and Peoria, Springfield, Decatur, Galesburg and Wheaton, Ill.

A subsidiary of Benjamin Edwards, Inc., Benjamin F. Edwards & Co. is a full-service brokerage and a Registered Investment Adviser, which offers a wide array of financial products and advisory services to its clients and financial consultants. For more information about Benjamin F. Edwards & Co., please visit [www.benjaminfedwards.com](http://www.benjaminfedwards.com).

###