

ALLEGIANT

PRIVATE ADVISORS



Martin J. Kossoff
CFP® / AIF®
Principal, Chairman

CERTIFIED FINANCIAL PLANNER™

In his current role as Chairman, Marty focuses on enhancing the company's performance, growth and efficiency. Marty was President of Allegiant Private Advisors from 1998 through 2018. He served as primary advisor to all clients and managed the firm's day-to-day operations and strategic growth for two decades as the company developed its unique team approach to customized wealth management. Prior to moving to Sarasota with his family in 1997, Marty led the Private Bank at Wells Fargo in San Francisco, an office with \$25 billion under management. He enjoys advising local non-profit organizations and currently serves on and consults with several non-profit boards. Marty continues to lecture at national conferences for the industry. He is a CERTIFIED FINANCIAL PLANNER™, an Accredited Investment Fiduciary®, and has been recognized by both Barron's (2013, 2014) and the Financial Times (2013) as one of the Top Advisors in the US.



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Advisory Services Offered Through Commonwealth Financial Network, a Registered Investment Adviser

To compile this annual list, Barron's uses data provided by some of the nation's most productive advisors. Barron's takes a number of criteria(1) into account for this state-by-state ranking, including assets under management(2); revenues generated by advisors for their firms; quality of practices, which includes examination of regulatory records; and philanthropic work.

Overall, in 2013, 3,000 advisors were considered, and 1,000 (33 percent of candidates) were recognized. Overall in 2014, 3,000 advisors were considered, and 1,200 (40 percent of candidates) were recognized. The list includes both Registered Investment Advisors and Investment Adviser Representatives; some states may include more advisors than others, in proportion to state populations. This award is not indicative of the wealth manager's future performance. Your experience may vary.

To compile the 2013 list, the Financial Times evaluated nominees on six primary areas and calculated a numeric score for each advisor. The areas of consideration were assets under management (AUM), asset growth, compliance record, experience, credentials, and accessibility. Approximately 960 qualified applications were received; 400 advisors were selected, representing 41.6 percent of applicants. Not indicative of advisor's future performance. Your experience may vary. For the full methodology, please visit ft.com.