

ALLEGIANT

PRIVATE ADVISORS



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

CERTIFIED FINANCIAL PLANNER™

Marty has been President of Allegiant Private Advisors since 1998. He serves as primary advisor to all clients, and sits on the firm's Investment Committee. 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 lectures at national conferences for the industry and has been quoted in the national media. He is a CERTIFIED FINANCIAL PLANNER™, an Accredited Investment Fiduciary®, and is proudly 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 Advisers 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.