

**FOR IMMEDIATE RELEASE**

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**FINANCIAL ADVISORS MICHAEL LIPKINS, MICHAEL COONEY, BRETT EVERHART, AND  
LAURA PEDRONCELLI NAMED TO BANK INVESTMENT CONSULTANT'S 2019 TOP 100 ADVISORS LIST**

**ROCKLIN, Calif. – February 11, 2020 –** [Raymond James Financial Services, Inc.](#) and [Addison Avenue Investment Services](#), the investment services division of [First Tech Federal Credit Union](#), are pleased to announce that Financial Advisors Michael Lipkins, AIF®, Michael Cooney, CRPC®, Brett Everhart, CFP®, and Laura Pedroncelli have been named to *Bank Investment Consultant's (BIC's) 2019 Top 100 Advisors list*, revealed on December 13. This is the third year in a row that each advisor has been named to this prestigious list.

Compiling BIC's Top 100 Advisor list requires a number of variables that factor into one composite score. This ranking is an honor that recognizes all-around achievement including management, production, percentage change in AUM and production, the amount of fee business from the most recent production figures, and other attributes.\* The complete list of the 2019 Top 100 Advisors can be found [here](#).

"To be named to the BIC Top 100 Bank Advisors list for the third year in a row is a monumental achievement and a top honor within our industry," said Addison Avenue Investment Services President and Investment Executive, Scott Jenner. "Addison Avenue's success is largely due to the great team we have built, and their dedication to providing the highest quality of services to our clients. I want to thank them for all of their contributions that helped make this honor possible."

CFP® and CERTIFIED FINANCIAL PLANNER™ are certification marks owned by the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete the CFP® Board's initial and ongoing certification requirements.

\* To compile the list, multiple variables were combined into one composite score. The six categories used were: (1) assets under management; (2) trailing-12 month production; (3) percentage increase in AUM from the previous year; (4) percentage increase in T-12 production; (5) amount of fee business; and (6) the ratio of production-per-AUM. The nominees were ranked by each of the six categories and then six different scores were calculated based on where they ranked. Those six scores were used to compile the final list. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of the advisor's future performance. Neither Raymond James nor any of its Financial Advisors pay a fee in exchange for this award/rating.

**About Addison Avenue Investment Services**

Addison Avenue Investment Services was initially launched in 1998 to serve the investment needs of Hewlett-Packard employees. The team at Addison Avenue Investment Services has helped make their credit union investment program the largest in the nation<sup>1</sup>, with its Financial Advisors managing more than \$4.2 billion in assets for First Tech's 620,000+ members. There are 35 advisors operating in 41 First Tech branches across eight states.

Financial Advisors offer securities through **Raymond James Financial Services, Inc.** Member [FINRA](#)/[SIPC](#) and

securities are not insured by credit union insurance, the NCUA or any other government agency, are not deposits or obligations of the credit union, are not guaranteed by the credit union, and are subject to risks, including the possible loss of principal. First Tech Federal Credit Union and Addison Avenue Investment Services are not registered broker/dealers and are independent of Raymond James Financial Services, Inc. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. <sup>1</sup>Raymond James is not affiliated with Kehrer Bielan Research & Consulting.

<sup>1</sup>Kehrer Bielan Research & Consulting, 2018

**About First Tech Federal Credit Union**

First Tech Federal Credit Union is a \$12+ billion institution headquartered in San Jose, California. It is the nation's premier credit union serving the world's leading technology-oriented companies and their employees, including HP Inc., Hewlett Packard Enterprise, Microsoft, Agilent, Intel, Cisco, Amazon, Nike, Intuit, Google, and more. First Tech is recognized as the industry catalyst for delivering effortless banking experiences to more than 620,000 members through its 41 branch locations, more than 5,600 CO-OP Shared Branch locations, 30,000 CO-OP Network ATMs, and online platforms. First Tech offers a full range of financial services, including traditional banking, online banking, mortgages, financial planning, various consumer loans, and insurance services. Federally insured by NCUA. Equal Housing Lender. For more information, visit [www.firsttechfed.com](http://www.firsttechfed.com).

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