

Impactful Investment Firm Vanderbilt Financial Group Continues to Expand Throughout 2020

Impact-focused Investment Firm Vanderbilt Financial Group continues to flourish in 2020, with increased recruitment, business growth despite COVID-19 pandemic.

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Stephen Distanto, Vanderbilt Financial Group Founder and Chairman

Investment Firm [Vanderbilt Financial Group](#) continues to flourish in 2020, with increased recruitment and business growth in the fall season despite the COVID-19 pandemic.

“We are thrilled to once again report that we have added a record amount of Financial Advisors to our team and are continuing to increase our west coast presence,” said Joseph Trifiletti, President of Vanderbilt Financial Group. “2020 has really been a benchmark year for our firm. We can’t wait to see what 2021 has in store for us.”

“Our firm’s focus is on socially and environmentally responsible investments. With many still reeling from the

effects of the Coronavirus pandemic, increased racial tensions and a polarizing presidential election, Advisors want to work at a firm that is more purposeful,” stated Stephen Distanto, Vanderbilt Financial Group Founder and Chairman. “This increase in recruitment will allow us to be even more impactful during turbulent times.”

Vanderbilt also attributes their recruitment success to their increased investment in technology, which both improves business processing time and increases the value of an Advisor’s practice by being at the forefront of technology with straight through business processing. Vanderbilt recently expanded its RIA affiliate firm that offers new strategic relationships with Charles Schwab, TD Ameritrade and Fidelity Institutional Wealth Services (IWS).

Below are a few of the entrepreneurial leaders who have joined the team as Financial Professionals during the autumn of 2020:

Anthony Cross, CLU®, ChFC® comes to us from ONESCO and brings 35 years of experience working in the Financial Services industry. His practice is located in Edmond, Okla., which marks Vanderbilt's expansion into our 25th state in the U.S.

Luna Jaffe, CFP® is the Founder and CEO of Lunaria Financial, where her focus is on combining her two passions: creativity and money. Luna is a Certified Financial Planner™, an Accredited Asset Management Specialist™, and the author of "Wild Money: A Creative Journey to Financial Wisdom." She is located in Portland, Ore. and previously worked for KMS Financial Services, Inc.

Ryan Bhattacharyya joins us from Cambridge Investments. His practice is located in West Des Moines, Iowa. "Vanderbilt aligns with my values on a future governed by sustainability and social justice and an environment that champions these causes."

Joining us from KMS Financial Services, Inc, Michael Radakovich, CFP®, BFA, CLU, ChFC, William Fisher, CFP®, CLU, ChFC and JT Greenwood, CRCP. Together, they've formed Summit Advisors NW, where they focus on creating personalized plans for the clients they serve throughout Portland, Ore., Danville and San Jose, Calif., respectively. Michael, Bill and JT have over 70 years of combined experience.

Elliot Ford of Principal of Ark Financial, has over 25 years industry experience, located in Twisp, Wash., where he focuses on Animal Welfare Investing. He joins us from KMS Financial Services, Inc.

Ken Martinson, CPA, CIMC and Curt Stoller are the founders of Martinson Stoller Advisors, a Wealth and Retirement Management Company specializing in financial services and advice for individuals, families, businesses, and sponsors of qualified 401k retirement plans. They previously worked for KMS Financial Services, Inc. at their Walnut Creek, Calif. office.

Dan Prentice, CLU, ChFC of Columbia Benefit Consulting is located in Vancouver, Wash. He has over 30 years of experience in the financial services industry and comes from KMS Financial Services, Inc.

About Vanderbilt Financial Group: Vanderbilt Financial Group is an investment firm disrupting traditional finance by focusing on socially and environmentally responsible, ethical and impactful investments. Vanderbilt is known as "The Sustainable Wealth Management Firm" for their commitment to providing Financial Advisors and their clients with access to values-aligned investments. Headquartered in a LEED-certified Platinum building, Vanderbilt's commitment to changing the world begins at home in our office and within our culture. Under the leadership of the impactful trio, including husband and wife team, Steve and Heidi Distant, Vanderbilt's culture has garnered awards such as being named one of the Long Island Business News Best Places to Work on Long Island for three consecutive years, the Future50 and Corporate Culture Awards from SmartCEO, as well as being recognized as one of the finest run companies by the Management Action Plan (M.A.P.) organization.

For more information on Vanderbilt Financial Group, please visit www.joinvanderbilt.com.

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