

A History of Progress

Girard Partners' heritage is deeply rooted in the Philadelphia investment community, home of the nation's first stock exchange. Since 1995, we've continually transformed ourselves to deliver diversified wealth management solutions with a commitment to fostering personal relationships with our clients.

1995
1996
1999
2002
2006
2008
2009
2010
2011
2012
2013

- 1995** – Girard Partners is **founded** by Richard Seidel and registered with the SEC and National Association of Security Dealers
- 1996** – Kevin Norris and Don Naimoli—former executives of The Fairfield Group and Girard Bank—**join Girard Partners**
- 1999** – John W. Church, Jr., former head of the Investment Division at Glenmede Trust Company, **joins as Chairman** of the Investment Policy Committee. Tom Crossett, of First Pennsylvania Bank, **joins as Vice President**
 - Girard Partners **moves to new offices** in Conshohocken, Pennsylvania
- 2002** – Company **experiences growth** and moves to expanded offices in King of Prussia, Pennsylvania
- 2006** – Kevin Norris becomes President; Richard Seidel **assumes the title of Chairman**
- 2008** – As a result of **continued growth** and staff expansion, Girard Partners relocates to larger offices in King of Prussia, Pennsylvania
 - Reveals **new corporate identity** and “chain” logo to reflect Girard Partners’ strength and personal relationships created with clients
 - The *Barron’s Winner’s Circle* and *Philadelphia Business Journal* name Kevin Norris the **region’s Top Performing Wealth Advisor**
- 2009** – **Expands presence** with southern U.S. clients by opening a branch office in Fort Myers, Florida
 - *Philadelphia Magazine* names Girard Partners 5-Star: **Best in Client Satisfaction** Wealth Manager
 - **Institutes Client Advisory Board** to improve client service and satisfaction
 - **Establishes Girard Capital LLC**, a broker-dealer firm
 - Girard Partners **doubles its assets** under management in four years
- 2010** – *Financial Advisor Magazine* recognizes Girard Partners in **top firms ranked by assets under management** in 2009
- 2011** – Girard Partners **expands its presence in the mid-Atlantic region** by acquiring an advisory firm in Richmond, Virginia
 - Rolls out advanced **web-based portfolio management system**, allowing clients to monitor portfolios in real time, 24/7
 - Hires Lisa Colon as Chief Operating & Compliance Officer to **ensure the firm’s regulatory adherence** to SEC guidelines
 - *Philadelphia Magazine* names Girard Partners 5-Star: **Best in Client Satisfaction** Wealth Manager
 - **Launches a full suite of life, liability, and long-term care insurance solutions** to round out our wealth management capabilities
- 2012** – *Financial Advisor Magazine* recognizes Girard Partners as one of the **top 50 fastest-growing firms**
- 2013** – Girard Partners **surpasses \$400M in assets** under management