



FOR IMMEDIATE RELEASE
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TELLONE MANAGEMENT GROUP NAMED AS CNBC TOP 100 WEALTH MANAGEMENT FIRM

ANAHEIM HILLS, CA

Tellone Management Group was ranked number 54 in the nation of the *Top 100 Fee-Only Wealth Management Firms* by CNBC. The list, which is the first of its kind for CNBC, was created based on a ranking methodology developed by CNBC in collaboration with Meridian-IQ.

Notably, Tellone Management Group was the only Orange County, CA based firm. Dino Tellone, CFP[®], EA, MBA, founder and CEO, was elated upon discovery of being named to such an impressive list of wealth management firms across the United States. In response, Dino stated that "Tellone Management's goal has always been to maximize their client's wealth and long-term prosperity. It is an honor to be recognized for our commitment to consistently providing clients with the best service over the past 27 years." Dino feels that Tellone Management Group's core philosophy of always putting clients first in any situation has been acknowledged, and he is even more inspired to provide an unparalleled client experience.

The ranking methodology was based on several factors, including having staff with professional designations such as CFP[®] or CFA, and working with third-party professionals such as attorneys or CPAs. Celebrating his 22nd year with the company, Steven Wolfe, CFP[®], Life Agent, Vice President of Investments, expounded that "having a stable group of knowledgeable and reliable in-house credentialed professionals and subject matter experts across all areas of wealth management has certainly been a source of value for our clients." Associate Portfolio Manager, Derek Pantele, CFP[®], CFA, added that "it is a genuine blessing and undeniable source of passion to be a part of a business that has the daily opportunity to make a positive contribution to the quality of life for others."

Other determinable factors for making the inaugural CNBC list include: assets under management, average account size, client segmentation, growth of assets, years in business, the number of advisory clients, and providing advice on insurance solutions. The final step was to apply the AdvicelQ Regulatory Compliance Review (RCR) process to the master list and eliminate any firm that failed the RCR due diligence process. In order to pass, an advisory firm cannot have any complaints, actions or disclosures from any of the four primary regulators: SEC, FINRA, state regulators, and state insurance commissioners.

Fee-only financial advisers do not accept compensation or fees based on products that they sell. According to the Financial Planning Association, a leading professional association of financial advisers, this structure helps reduce conflicts of interest that are inherent in a commission-based structure.

For the full list of CNBC's Top 100 Fee-Only Wealth Management Firms, go to <http://www.cnbc.com/id/101619698>.

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