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The Potter Financial Group Joins Commonwealth Financial Network®

Waltham, MA (June 20, 2018)—Commonwealth Financial Network®, the nation’s largest privately held Registered Investment Adviser–independent broker/dealer, announces the addition of The Potter Financial Group, of Durham, North Carolina, to its network of independent financial advisors. Formerly affiliated with Kestra Financial, partners Charlie Potter, CLU®, ChFC®, RFC, AEP®, CLTC; Chip Roe, CFP®, CRPC®, CRPS®; and Price French, RFC, CLU®, along with wealth advisor associate Jason Harmon, CFP®, bring with them more than \$130 million in assets under management.

The Potter Financial Group takes a consultative approach to providing independent financial advice tailored to each client’s unique needs. Offering a high-touch service, the firm prides itself on serving as its clients’ personal CFO and trusted advisor, helping clients make good financial decisions as they pursue their goals. A key component of this experienced team’s value proposition is to fully understand each individual’s goals and concerns—whether it is to retire with freedom and dignity or to protect a family legacy. For more information about the firm, visit www.potterfinancialgroup.com.

“This was not an easy decision for us—we had been with our prior affiliate for 20 years,” said Chip Roe. “Amid industry change and consolidation, what became of utmost importance to us was private ownership, a sound business model and organizational structure, and a low advisor-to-staff ratio to ensure the prioritization of our practice. With Commonwealth’s level of support and array of business models that we can operate within, we are confident that this is the best move for our business—current and future state—and our clients.”

“I am pleased to welcome The Potter Financial Group to the Commonwealth community,” said Andrew Daniels, managing principal, business development. “This team is well positioned for the future. With an alignment in core values, we look forward to providing the hands-on support, powerful tools, and flexible infrastructure their firm desires, enabling them to maximize time spent with their clients.”

About Commonwealth Financial Network

Founded in 1979, Commonwealth Financial Network, member FINRA/SIPC, is the nation’s largest privately held Registered Investment Adviser–independent broker/dealer, with headquarters in Waltham, Massachusetts, and San Diego, California. The firm supports approximately 1,800

independent financial advisors nationwide. For more information, please visit www.commonwealth.com.

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