

Ranked by the number of planners in the Hudson Valley; listed alphabetically in event of tie.

Rank	Name, address, phone number Area code: 845 (unless otherwise noted) Website	Top local executive Contact (bold) Email address Year firm established	Number of planners in the Hudson Valley	Number of employees in the Hudson Valley	Payment options			Planning services offered						Other	
					fee based	commission based	fee and commission based	retirement	college	estate	corporate/small-business	investment	tax		risk management
1	New Horizons Asset Management Group L.L.C. 11 Racquet Road, P.O. Box 10186, Newburgh 12552 567-3930 • nhamg.com	Steven R. Gleason Steven R. Gleason sgleason@nhamg.com 2000	8	11			✓	✓	✓		✓	✓	✓	✓	
2	Integrated Financial Partners/ Lincoln Financial Advisors 185 Route 312, Suite 101B, Brewster 10509 278-2629, ext. 206 • ifpadvisor.com	Philip G. Masi MBA, CFP Philip G. Masi philip.masi@ifg.com 2004	6	7			✓	✓	✓	✓	✓	✓		✓	
3	Financial Services Center Asset Management Inc. 3944 Route 9G, Red Hook 12571 876-1919 • finsrctr.com	Joseph F. Christiana Joseph F. Christiana jchristiana@finsrctr.com 2003	5	5	✓			✓	✓	✓	✓	✓	✓	✓	
4	Cornerstone Financial 42 Overlook Road, Poughkeepsie 12603 452-4080	Jack Cupelli Pat Simone patsimone@aol.com 1995	2	2		✓		✓	✓	✓					Insurance
	Eastern Planning Inc. 800 Westchester Ave., Suite 641N, Ryebrook 10573 627-8300 • easternplanning.com	Beth Blecker Randi Proce bblecker@easternplanning.com 1995	2	2	✓			✓		✓	✓	✓	✓	✓	
	John G. Ullman & Associates Inc. 30 E. Market St., Rhinebeck 12572 876-4499 • jgua.com	Barbara Markell CFP Barbara Markell CFP markellb@jgua.com 1978	2	2	✓			✓		✓	✓	✓	✓	✓	
5	Emerald Retirement Planning Group Inc. P.O. Box 513, Stony Point 10980 942-8578 • emeraldretirement.com	Matthew S. Clement Matthew S. Clement matthew@emeraldretirement.com 2003	1	1			✓	✓	✓	✓		✓		✓	Behavioral
	Krane Financial Services Corp. 56 Mayer Drive, Suffern 10901 369-7226 • cantella.com	Barry Krane CFP Barry Krane CFP bkrane@cantella.com 1999	1	1			✓	✓	✓	✓	✓	✓	✓	✓	Divorce financial planning

Questions or comments, call (914) 694-3600, ext. 3005.