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SIMON, JOHNSON & STANGER (SJS WEALTH ADVISORS)
TEAM UP WITH RAYMOND JAMES & ASSOCIATES

TAMPA, Fla. – Three long-standing Tampa Bay financial professionals are teaming up to form a new partnership and wealth management firm. Geoffrey Simon and Debi Johnson, formerly of the Simon Group at Robert W. Baird & Co., and James Stanger, formerly of Sagemark Consulting, a subsidiary of Lincoln Financial, have formed Simon, Johnson & Stanger (SJS) Wealth Advisors of Raymond James & Associates.

"We are very enthusiastic about SJS Wealth Advisors," said Simon. "I've known and respected Jim Stanger for more than 20 years, and I've worked closely with Debi Johnson for more than a decade. They are great people, and true professionals."

Stanger said he, Simon and Johnson were very deliberate in establishing their team. "We all agreed that independence, integrity and quality had to be the foundation of our partnership and the services we provide our clients," he said. "We did our due diligence on investment firms to partner with, and Raymond James& Associates came out on top. We are proud to be affiliated with such an outstanding firm."

Simon was a senior vice president of investments with Robert W. Baird & Co. for more than 15 years, a senior partner in the Simon Group at Baird. He was one of Baird's top financial advisors in Florida and is well known in the Tampa Bay area for his financial reporting for both television and print.

For the past 13 years, Simon has produced and hosted "Simon Says," a weekly financial news segment on WTVT Fox 13's morning news program, "Good Day Tampa Bay." For the past three years, he also has produced the "Suncoast Business Forum," a monthly primetime interview program featuring prominent business and financial experts. For several years, Simon wrote a weekly financial and investment column for the *Tampa Bay Business Journal*. Geoff holds an MBA from the University of South Florida.

Debi Johnson has 18 years' experience in the financial services industry. She was a senior investment consultant with Robert W. Baird & Co. for more than 11 years. For 10 of those years she worked with Simon as a partner in the Simon Group. The Simon Group specialized in comprehensive wealth management, including financial planning and independent investment consulting. Johnson's expertise is in financial planning, portfolio analysis and management, and asset allocation modeling.

Prior to joining Baird, Johnson spent seven years as a registered sales associate and branch administrative manager with Prudential Securities in Columbus, Ga.

Before entering the financial services industry, she taught high school math and computer programming, and served as program director for the Easter Seals Child Development Center.

Jim Stanger has more than 30 years' experience as an advisor to high-net-worth individuals and owners of closely held businesses. Jim specializes in financial and estate planning, retirement planning, wealth preservation and complex insurance planning.

He was the national director of Lincoln Financial subsidiary, Sagemark Consulting, for more than 10 years. He coordinated advanced financial planning for top clients of national and regional banks, financial institutions and brokerage firms, including Morgan Stanley, UBS Paine Webber, SunTrust, Key Bank, Fleet Bank, Willis and others.

Stanger is a CERTIFIED FINANCIAL PLANNER™ professional, holds a Master of Science degree in financial and estate planning, is a Chartered Retirement Planning Counselor℠, an Accredited Estate Planner and a Chartered Financial Consultant. He has lectured and been interviewed nationally on financial, estate planning and retirement topics.

Prior to Sagemark Consulting, Stanger was regional CEO in Florida for CIGNA, a large international employee benefits firm, for more than 13 years. He is a member and past board member of the Tampa Bay Estate Planning Council, FPA of Tampa Bay, Greater Tampa IAFP and the Tampa Insurance & Financial Advisors. He was also on the USF Professional Advisory Council and active in the Community Foundation of Greater Tampa.

SJS Wealth Advisors is located at One Harbour Place on Harbour Island in downtown Tampa. The SJS website is sjs-advisors.com.

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For additional information, please contact Geoff Simon at 813-784-6834

or visit www.sjs-advisors.com.

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