

# SFA Partners Hires Director of Business Development

SFA Partners, a group of financial services firms, has hired Bryan Yvon as director of business development. In his new position, Yvon will focus on attracting new advisors to the company – which includes its dually registered broker-dealer, The Strategic Financial Alliance, and its registered investment advisor, Strategic Blueprint. Yvon will also be responsible for “promoting the organic growth of the firm’s existing professionals.”

Yvon is a longtime financial services industry veteran, starting in 1994 as a financial advisor at Allmerica Financial. He embarked on a wholesaling career in 1998 with a stint at The Phoenix Funds, and from there, he spent more than two decades wholesaling across the Southeast for a number of asset managers, including Transamerica, Prudential, and W.P. Carey. Yvon most recently served as director of investment relations at BC Partners.

“I’m thrilled to welcome Bryan to the SFA Partners community. His experience, not only as a wholesaler but as an advisor, makes him a perfect fit to accelerate our current growth trajectory. I look forward to partnering with him as he works to bring aboard new advisors and expand Strategic Blueprint, which has fast become a go-to destination for growth-focused, advice-based independent financial professionals,” said Jamie Mackay, executive vice president and chief operating officer.

SFA Partners provides shared services for The Strategic Financial Alliance, an independent broker-dealer and corporate RIA; Strategic Blueprint, an independent RIA geared to serving fee-based advisors; and SFA Insurance Services. Collectively, the firms serve more than 150 advisors who manage about \$6 billion in assets.

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# SFA Partners Names EVP and Chief Operating Officer

SFA Partners, a group of independent financial advisor businesses, has promoted Jamie Mackay to executive vice president and chief operating officer. In his new role he will maintain his current business development responsibilities and assume oversight of all SFA Partners' day-to-day operations.

Mackay, who joined the firm in 2017 as vice president of business development, is a financial services professional with more than 20 years of experience serving in senior leadership positions. He will continue to report to Clive Slovin, president and chief executive officer, who will focus on "strategic growth initiatives for the company."

"I am excited for Jamie to take on this new and expanded role within our company," said Slovin. "Over the years, not only has he developed a deep understanding of all aspects of our business, but he's been integral in growing our firm with many of the advisors who have joined our community in recent years coming aboard due to his tireless efforts. Going forward, I am excited to collaborate with Jamie as we develop and execute a strategic plan to benefit our advisors and their clients."

SFA Partners said that Mackay has been "instrumental in attracting advisors to the firm" with many of them joining the firm's registered investment advisor, Strategic Blueprint, which launched in 2017 and has doubled its assets under management in each of the past two years, growing from approximately \$400 million to \$1.6 billion.

SFA Partners is the umbrella company for The Strategic Financial Alliance, Strategic Blueprint, and SFA Insurance Services.

The Strategic Financial Alliance is a privately owned independent broker-dealer and RIA, which serves approximately 150 independent financial advisors across the country, collectively supporting approximately \$6 billion in advisory and brokerage assets as of December 31, 2021.

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## **SFA Partners Adds Four Wealth Management Firms to Platform**

SFA Partners, a group of independent advisor-focused entities, has recruited four wealth management firms: Kolinsky Wealth Management, Lehner Carroll Shope Capital Management, OakPoint Investment Partners, and Life Income. Together, the offices have more than \$585 million in client assets – more than \$200 million of which has been added to platforms under the SFA Partners brand.

SFA Partners encompasses The Strategic Financial Alliance (SFA), an independent broker-dealer and corporate RIA; Strategic Blueprint, an independent RIA geared to serving fee-based advisors; and SFA Insurance Services.

Kolinsky Wealth Management, based in Ramsey, New Jersey, is led by Stephen Kolinsky, Jason Kolinsky, and Chad Kolinsky, who have registered with SFA for their broker-dealer business, which encompasses approximately \$80 million in assets. It also oversees \$140 million through its retirement plan business and

manages more than \$230 million in assets through its own RIA. The Kolinsky's were previously registered with American Portfolios Financial Services.

Lehner Carroll Shope Capital Management, based in Perrysburg, Canfield and Canton, Ohio, is led by managing partners Brian Lehner and Amy Shope. The firm will offer advisory services through Strategic Blueprint, where they directly manage about \$30 million, and they also bring approximately \$36 million to SFA in broker-dealer business. Lehner and Shope were previously registered with Berthel, Fisher & Company and BFC Planning Inc.

OakPoint Investment Partners, based in Southfield, Michigan, is led by Rebecca Abel and has affiliated with Strategic Blueprint where she manages \$35 million in advisory assets. Abel joins from Ameriprise.

Life Income, based in Salem, South Carolina, is led by Roger Woodruff who manages \$35 million in advisory assets through Strategic Blueprint. Woodruff were previously registered Securities America, Inc.

The Strategic Financial Alliance Inc. serves approximately 150 independent financial advisors across the country, collectively supporting approximately \$5 billion in advisory and brokerage assets.

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## **RIA Strategic Blueprint Names**

# Former FS Investments Exec as New EVP

Strategic Blueprint LLC, an independent registered investment adviser firm, has named David Pittman to the newly created role of executive vice president. In his new role, Pittman will focus on building out the firm's capabilities and offerings, while attracting financial advisors to its platform.

With 16 years of experience with retail alternatives distribution, Pittman most recently spent six years at FS Investments, a retail alternative investments firm. While at FS, he served as a regional sales director and served on the company's management advisory committee. Pittman also spent nearly nine years as an alternative investment wholesaler at Wells Real Estate Funds.

"Over his 16 years in the distribution space for retail alternatives, a longstanding area of focus for our organization, David has worked closely with thousands of financial advisors, bringing a unique blend of empathy, perspective and expertise in helping them to address challenges and capture new opportunities," said Clive Slovin, president and CEO of SFA Partners.

Pittman holds a bachelor's in business administration from the University of Georgia, as well as the certified investment management analyst and chartered alternative investment analyst professional designations.

The Strategic Financial Alliance Inc., a privately owned independent broker-dealer with \$4.9 billion in advisory and brokerage assets, [launched Strategic Blueprint](#) in April in alliance with TD Ameritrade. Both Strategic Financial Alliance and Strategic Blueprint are part of the SFA Partners family of

financial services companies.

Strategic Blueprint's platform offers custody, clearing, product due diligence, technology, compliance and wealth management for independent financial advisors across the country.

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## **The Strategic Financial Alliance Launches New RIA with TD Ameritrade**

The Strategic Financial Alliance Inc., a privately owned independent broker-dealer with \$4.9 billion in advisory and brokerage assets., has launched Strategic Blueprint LLC, a new registered investment adviser formed in alliance with TD Ameritrade.

Strategic Financial Alliance and Strategic Blueprint are part of the SFA Partners family of financial services companies. Julie Sullivan, Strategic Financial Alliance senior vice president and chief compliance officer, will serve as president of Strategic Blueprint.

Strategic Blueprint utilizes TD Ameritrade Institutional for custody and clearing services in one platform that features a range of investment vehicles encompassing mutual funds, ETFs, closed-end funds and other traditional investment vehicles through TD Ameritrade. The platform also offers alternative investments provided through relationships with specialty product sponsors.

“Strategic Blueprint combines the benefits of independence with the support of a powerful, turnkey technology platform, robust administrative and back office functions, and a vibrant and welcoming community of client-focused financial professionals,” said Sullivan. “We are providing the blueprint, the tools and the foundation, while advisors bring their vision and passion for their businesses.”

Based in Atlanta, Georgia, The Strategic Financial Alliance is significantly owned by the approximately 150 independent financial advisors it serves.

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