

Financial Institutions Group Team

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Private Banks, Asset Managers & Insurance



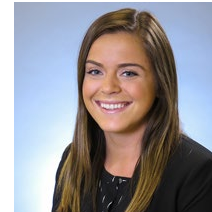
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FIG Firm Coverage

Independents

	RD Coverage	CRG Coverage
Fidelity	Robyn Alcorta / Research: Olivia LaMagna	Jillian Hefner / Danny Martin
Charles Schwab/TD	Robyn Alcorta / Max Walker	Jillian Hefner / Danny Martin
LPL	Ron Krisko / Research: Olivia LaMagna	Jillian Hefner / Danny Martin
Pershing	Ron Krisko	Jillian Hefner / Danny Martin
Envestnet	Robyn Alcorta / Ron Krisko	Jillian Hefner / Danny Martin
Raymond James	Robyn Alcorta / Ron Krisko	Jillian Hefner / Danny Martin
Betterment	Olivia LaMagna / Sam Morrison	Joey Belisle
Commonwealth	Ron Krisko / Research: Olivia LaMagna	Jillian Hefner / Danny Martin
Osaic	Ron Krisko	Sami Samaan / Dan Weaver
M1	Olivia LaMagna	Joey Belisle
Morningstar	Olivia LaMagna / Sam Morrison	Joey Belisle / Danny Martin
Wealthfront	Sam Morrison	Joey Belisle
Other	GCG_FIG@dimensional.com or call (512) 306-4308	

Nationals

	RD Coverage	CRG Coverage
Edward Jones	Max Walker / Research: Olivia LaMagna	Jillian Hefner / Danny Martin
RBC	Max Walker	Jillian Hefner / Danny Martin
Robert Baird	Max Walker	Jillian Hefner / Danny Martin
Wells Fargo	Robyn Alcorta / Max Walker	Jillian Hefner / Danny Martin
Stifel	Max Walker / Robyn Alcorta	Jillian Hefner / Danny Martin
Ameriprise	Robyn Alcorta / Max Walker	Jillian Hefner / Danny Martin
OpCo	Max Walker	Jillian Hefner / Danny Martin
Janney	Max Walker / Ron Krisko	Jillian Hefner / Danny Martin
Other	GCG_FIG@dimensional.com or call (512) 306-4308	

FIG Firm Coverage

Private Banks

	RD Coverage	CRG Coverage
UBS	Robin Thompson / Tracy Mitchell / Research: Sam Morrison	Sami Samaan / Danny Martin
BOA-Merrill	Robin Thompson / Sam Morrison	Sami Samaan / Danny Martin
JP Morgan	Barrett Brown / Gavin Wallace / Research: Olivia LaMagna	Sami Samaan / Dan Weaver
Northern Trust	Barrett Brown	Sami Samaan / Dan Weaver
Morgan Stanley	Robin Thompson / Tracy Mitchell / Sam Morrison	Sami Samaan / Danny Martin
BNY Mellon	Barrett Brown / Gavin Wallace	Sami Samaan / Dan Weaver
Citi	Robin Thompson / Gavin Wallace / Tracy Mitchell / Research: Sam Morrison	Sami Samaan / Jillian Hefner
Goldman Sachs	Barrett Brown / Gavin Wallace / Research: Olivia LaMagna	Sami Samaan / Joey Belisle
HSBC	Barrett Brown / Gavin Wallace	Sami Samaan / Dan Weaver
Deutsche Bank	Gavin Wallace / Barrett Brown	Sami Samaan / Dan Weaver

Asset Managers & Insurance

	RD Coverage	CRG Coverage
Manulife	Robin Thompson / Max Walker	Jillian Hefner
Northwestern Mutual	Gavin Wallace	Sami Samaan / Jillian Hefner
Mass Mutual	Gavin Wallace	Sami Samaan / Dan Weaver
Other	Barrett Brown / Robin Thompson	Sami Samaan / Dan Weaver