

Professional Team Members

Kevin J. Ryan, Esq.

Kevin is CEO of the Wealth Planning Network with over 30 years experience working with affluent families in the area of estate and tax planning. Kevin is also the Senior Partner at the law firm of Ryan, Morton & Imms, where he concentrates his practice in matters concerning taxation, trusts, estate planning and administration, and business transactions. He was formerly the partner in the Business Department at Montgomery McCracken. Kevin has represented clients before the IRS in audits, appeals and trials, before the U.S. Tax Court and the Federal District Court. Mr. Ryan is a past president of the Exton Chamber of Commerce. Mr. Ryan frequently teaches and conducts seminars for attorneys, accountants and organizations in Chester county and surrounding areas. Kevin is a member of the Chester County and Pennsylvania Bar Associations.

Mr. Ryan is admitted to practice in Pennsylvania, U.S. Tax Court, U.S. District Court, Eastern District of Pennsylvania, and the U.S. Supreme Court. He received J.D. and LL.M. degrees from Villanova School of Law. He graduated from Villanova University with a B.S. in Economics in 1971.

Jay Ambrose, Private Wealth Management Consultant

Jay Ambrose is President of the Wealth Planning Network. He has more than 30 years of experience in the financial advisory and services industry. Mr. Ambrose works with high net worth families, closely held business owners and small institutions and their advisors to develop and implement appropriate wealth planning and tax efficient strategies. His particular emphasis is asset and liability protection through the use of Trusts, and entities while managing investable assets using local, regional and nationally recognized experienced portfolio managers using Domestic and International Equity, Fixed Income and Alternative Investment strategies. Mr. Ambrose previously managed a well known and respected specialized Private Banking Division in Philadelphia also focusing on wealth preservation and asset and liability protection strategies. Mr. Ambrose's distinguished managerial background helps drive a strong team approach and ethically based client-centered practice benefiting the affluent client and their family.

He earned a B.A. in Economics from Catholic University of America and an MBA in Finance from Southern Illinois University. Mr. Ambrose has been active in community work and currently is associated with the Delaware Guidance Services and other local charities.

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Edward J. Stavetski- Senior Consultant

Edward Stavetski is CIO of the Wealth Planning Network. Ed is responsible for asset allocation and investment policy decisions for all client portfolios. His focus is on managing the investment oversight process for ultra high net worth clients and designs customized asset allocation strategies. He performs due diligence on separate account and alternate investment managers and performs financial analysis on real estate and private equity opportunities.

Ed is also a senior consultant with Asset Strategy Consultants. His prior experiences include Chief Investment Strategist and Compliance Officer in 2004 and served as the firm's manager for the fund of funds at CMG Investment Advisors, LLC. He also served on the firm's investment committee and was responsible for manager due diligence.

He also founded Pembroke Capital Management, where he was the Chairman of the Investment Policy Committee and Chief Investment Officer. Pembroke Capital manages equity, fixed income and absolute returns for high net worth individuals, pensions and non-profit companies. Prior to his position with Pembroke, he was the Director of Equity Research and a Portfolio Manager for small cap value mutual funds at Pitcairn Trust Company. He also oversaw outside long only and hedge fund sub-advised managers.

Mr. Stavetski through his 30 years experience has worked as Chief Investment Officer at PNC Advisors, Senior Portfolio Manager and Director of Fixed Income at Rorer Asset Management where he managed over \$1 billion in pension, foundations and endowment assets. He was also Managing Director of Radnor Capital Management and Director of Research and Investments for W.H. Newbold's & Son, Inc.; and Investment Officer for John Hopkins University and University of Pennsylvania endowments.

Ed has been an active member of the CFA Institute and served as a board member and past President of the local chapter of The Financial Analysts of Philadelphia, Inc. He served as Chairman of the Professional Development Committee (formerly the Continuing Education Committee) for the CFA Institute. He also helps develop educational content for the program.

He was a regular contributor to *TheStreet.com*, Investopedia and Real Money. He has also spoken at Hedge Fund Conferences, CFA Institute Conferences and to affiliated Societies on Absolute Returns, Hedge Funds, Manager Selection and Due Diligence. Mr. Stavetski has written a book on Hedge Fund Manager Selection published by J.B. Wiley and Sons in 2009.

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Kristine M. Jankowski – Senior Planner CFP, MBA

Kristine received her MBA in Finance from Fairleigh Dickerson University and her CFP (Certified Financial Planner) designation in Denver, Colorado. As a consultant and wealth planning network advisor member, she is able to dedicate her time and expertise in supporting our initial wealth planning service process which allows our team of advisors to dedicate 100% of their time with both the initial and ongoing advisory responsibilities and process while we concentrate on our client's relationship.

Anna Green – Client Service and Operations Manager

Anna, is responsible for all aspects of client service and implementing client requests as they pertain to their financial and investment plans. Anna has over 15 years experience working highly affluent clients as part of the wealth planning team .

