

**EXCELLENCE.
FOCUS.
INDEPENDENCE.**

PRIVATE CLIENT GROUP ASSET MANAGEMENT

Bedminster, NJ

Establishing your continued success in the financial services industry requires identifying a partner that provides the support and stability to enable you to flourish. Private Client Group, AM has a proven track record of surrounding financial advisors with the tools and resources they need to prosper, in an environment that celebrates the highest levels of integrity and trust.



EXCELLENCE. FOCUS. INDEPENDENCE.



SOLID SUPERVISION

Enjoy access to a partner with established policies and procedures to keep you compliant while operating in an entrepreneurial atmosphere.



PRACTICE OPTIMIZATION GUIDANCE

Take advantage of Pentameter®, a proven practice management portal that provides a holistic set of tools and business consulting services to enhance the long-term value of your practice and maximize your profitability.



ADMINISTRATIVE EASE

Rely on a full team of our broker-dealer's transition specialists to manage your seamless transition, and our staff of registered branch assistants for ongoing support.



CONTINUED DEVELOPMENT

Knowledge leads to growth. Expand your knowledge by furthering your certifications through the certified wealth strategist program or sharpening your skills by networking with colleagues and industry experts at our broker/dealer's national conference or wealth management university events.



TURNKEY MARKETING

Become part of our established brand by plugging into the Private Client Group, AM marketing materials and website, or create your own brand and identity with Connect2Clients®, a marketing platform that allows you to customize communication and outreach, select from a library of pre-approved emails, newsletters, campaigns or even upgrade to a mobile app.



HANDS-ON CONSULTING

Enjoy access to retirement, insurance, asset and wealth management expertise to assist you in creating solutions for an affluent client base. Private Client Group utilizes Advanced Time Segmentation® to build strategic income and ensure clients are properly planned for retirement.



CONTINUITY & SUCCESSION PLANNING

Planning for the future of your business is essential to protecting your legacy. We have access to expert continuity and succession planning resources to help ensure you have plans in place within your first year of joining.



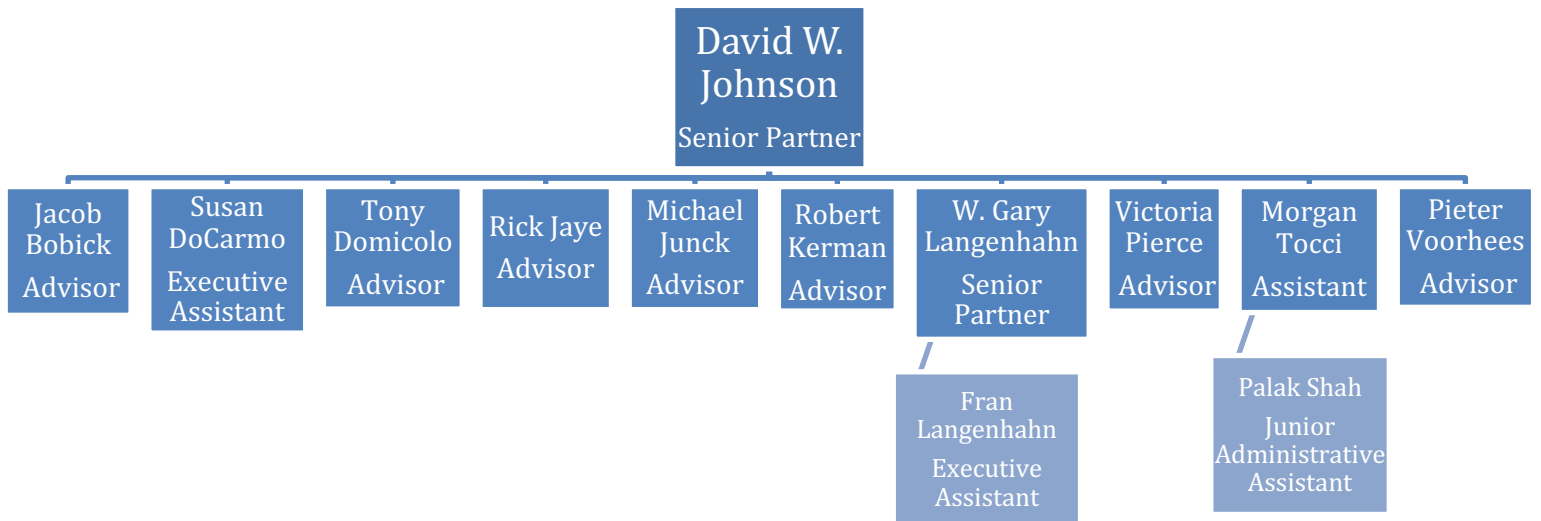
PRIVATE CLIENT GROUP, AM

Asset management solutions offered through Private Client Group, LLC., an independent registered investment advisor.

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Exhibit G: Organizational Structure



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Personnel information

David Johnson- Senior Partner

- David Johnson is the Senior Partner of Private Client Group Asset Management. As the lead partner of our team, David is responsible for overseeing portfolio construction as well as much of the direct interaction with our clients and their other trusted advisors. David draws upon his considerable experience in investment planning and management to deliver the finest possible customer service.
- Prior to founding PCG in January 2009, David was First Vice President of Investments for UBS, Paine Webber and Kidder Peabody for 22 years. In this role, David built a large and loyal client base that we continue to work with today.
- David currently sits on the Board of Trustees at Centenary University in Hackettstown, NJ and serves as treasurer. He also serves on the Parents Advisory Council at The College of Charleston. He sits on the Board of Trustees for Freedom House: a drug and alcohol rehabilitation facility in Glen Gardner, NJ. He also sits on the Board of Trustees for WeTip: a not-for-profit tip hotline in Cucamonga, California. He serves on the Advisory Board for The Rutgers Youth Sport Research Council and is a consultant to BAT (Baseball Assistance Team). Additionally, he serves on the Representative Advisory Council for First Allied Securities. He was previously on the Board of Trustees at Stillman College in Tuscaloosa, Alabama. David is a graduate of Old Dominion University in Norfolk, Virginia. He holds a Series 7 and 66 licenses and also has professional licenses in life and health insurance.

W. Gary Langenhahn- Senior Partner

- W. Gary Langenhahn has been a trusted financial advisor to individuals and businesses for more than 39 years. Today, he is one of the best known and most effective financial mentors to an ever-growing number of successful business owners, professionals and highly compensated executives. An avid public speaker and problem solver, Gary brings a unique perspective, uncompromising expertise and caring to his work with his clients.
- In 1972, Gary began his financial career in the competitive field of Life Insurance where he developed a clientele of successful entrepreneurs. Based on trusted relationships, he soon became more involved in his clients' overall financial needs, helping them design and implement retirement, estate, business transfer and employee benefit plans.
- Gary graduated cum laude with special honors from the State University of New York at Binghamton in 1971, receiving a B.A. in English Literature. He continued his education;

completing his CLU designation in 1978, his Chartered Financial Consultant designation in 1981, and in 1989 was awarded the highest designation in his field, a Master's Degree in Financial Services.

Tony Domicolo- Vice President Financial Advisor

- Tony Domicolo is the newest advisor at Private Client Group Asset Management. As a vice president financial advisor, Tony believes success should be measured not just by your financial well-being, but by how confident you feel about your future. His mission is to help you reach your financial goals through a personal relationship based on personalized, knowledgeable advice. This focus is designed to help you reach your goals, giving you greater confidence. Tony specializes in Retirement Planning Strategies, Saving for Education and Family Finances.
- Prior to arriving at PCG in June 2020, Tony was a Vice President Financial Advisor and Ameriprise for about 10 years. Before that, Tony was Vice President of Investments at Smith Barney for 5 years and Morgan Stanley for 11 years. He has been practicing financial advisory for over 35 years now.
- Tony is a graduate of Pace University-Lubin School of Business in New York City, New York. He holds a Series 66, Series 63 and Series 7 licenses as well as professional licenses in life and health insurance. Tony is also fluent in Italian.
- He currently resides in Wayne, New Jersey with his wife and three children. Tony is very passionate about soccer, and spends much of his time watching international matches, and occasionally travels to Europe to see the matches live. Additionally, all three of his children have played soccer at a Division I college level.

Robert Kerman- Financial Advisor

- Robert Kerman is the President of Robert Kerman Financial Services, LLC, and is an Investment Advisor Representative. His goal is to help his clients focus on objectives, and then to use the most satisfactory mix of strategies and financial products to achieve the desired results.
- Robert earned the RFC designation in 1987 from the International Association of Registered Financial Consultants (IARFC). Additionally, he has passed a rigorous course of study to become a Certified Wealth Strategist Professional (CWS®).
- Robert is a member of the Financial Planning Association (FPA) where he served on the Boards of Directors of the FPA Chapter of the Greater Hudson Valley, serving Westchester & Rockland Counties in New York and Fairfield County, Connecticut, for ten years. The FPA is a professional organization dedicated to supporting the financial planning process in order to help people achieve their goals and dreams. With 23,000 members nationwide, members of the FPA adhere to a code of ethics and continuing

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education in the interest of providing the highest level of professional service to their clients. Robert has also served on the Board of Directors of the International Association Of Financial Planners (IAFP).

- As a contributing professional in Westchester County and New York City's financial planning community, Robert is also a member of the American Economic Association, International Association of Registered Financial Consultants (IARFC), National Society of Accountants (NSA), National Association of Tax Professionals (NATP), and the New York/Connecticut Association of Tax Professionals.

Pieter Voorhees- Financial Advisor

- Pieter Voorhees, CLTC joined Private Client Group as a Financial Advisor in December 2015. Prior to that, Pieter served as a Financial Advisor with Ameriprise Financial, Morgan Stanley, and EF Hutton. He graduated from the University of North Carolina at Chapel Hill, with a B.S. in International Relations in 1964, and U.S. Naval OCS in 1965, after which he served for over four years in the U.S. Naval Reserve.
- As part of the Private Client Group team, Pieter strives to put clients in a position to choose what is right for them and their families based on an analysis of individual situations and goals.
- Pieter is involved with numerous local organizations including Care Givers Coalitions of Morris & Somerset Counties, the Senior Resource Center in Chester, NJ, the Long Valley Better Business Networking Group, and the Mount Olive Chamber of Commerce.

Susan DoCarmo- Executive Assistant

- With 14 years of financial services industry experience, Sue DoCarmo is the Executive Assistant for our team. She is a vital part of the superior level of service that we promise our clients. In her role as Executive Assistant, Sue provides clients with quality service with her strong administrative skills while overseeing much of the group's day-to-day operations.
- Sue also calls on her extensive knowledge of operations and accounting procedures to ensure that our client's needs are promptly met. She is responsible for much of the client interaction that takes place each day, seeing that clients are satisfied with all of their service and cash management needs.

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Jacob Bobick- Financial Advisor

- Jake got his start in the financial services industry in 2001, in the hard coal region of Eastern Pennsylvania. He spent the early years of his career working with “blue collar” employees who were aging into retirement- rolling 401(k)s, setting up health insurance benefits, and helping choose pension and social security elections- basically, helping people fully transition into their “non-working” years. At that time, most of his clients had never worked with a financial advisor, which shaped Jake’s view of the industry and helped him realize the importance of giving people sound advice as early as possible. Some initial success in rural Pennsylvania ultimately gave him an opportunity to do his work on a bigger scale in the Garden State, as he was asked to help open an office in Bridgewater in 2004.
- After growing his team in New Jersey, he decided to venture out on his own in 2009. This allowed him to round out his skill set, and he found himself working with business owners more frequently. He’s an expert in 401(k) plans and other retirement plans, and also adept at business succession planning; as well as more “personal” insurances such as disability, life, and long-term care insurance. He’s spent the past 5 years partnering directly with property & casualty insurance agencies, working with their business clients to ensure proper planning, but continues to work with individuals as well.
- Jake graduated from The Pennsylvania State University, and currently holds Series 6 and Series 63 licenses as well as professional licenses in life and health insurance. He resides in Milford, NJ, and enjoys spending time in the great outdoors.

Victoria Pierce- Financial Advisor

- Victoria joined Private Client Group in July of 2020. She will serve as a consultant specifically focusing on providing families living with a special need’s situation. Victoria will develop tailored solutions for the complexity faced by families with a special need’s member. This includes a comprehensive review of the beneficiary’s government benefits, medical, social and psychological conditions.
- Prior to joining Private Client Group AM, Victoria spent over 25 years as a Vice President – Investment Officer with Durland, Pierce and Labourdette Group at Wells Fargo Advisors. She provided comprehensive investment planning predominantly to families with emphasis on diligent attention to retirement and estate planning techniques.

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- Victoria graduated from St. Lawrence University with a BA in Sociology in 1991. She is a volunteer lacrosse coach and serves as a Meals on Wheels volunteer. Victoria resides in Tewksbury, NJ with her 4 daughters.
- She holds FINRA Series 7, Series 65, Series 63 licenses and holds the professional license for life and health insurance.

Rick Jaye- Financial Advisor

- Rick A. Jaye, AIF, joined Private Client Group in 2015 as an advisor to business owners and high net worth clients. In addition, Rick remains active with SENEX Group as National Director of Sales. SENEX is a leading retirement service organization offering superior back office support to advisors, institutions and RIA's.
- Prior to SENEX, Rick was National Director of Sales for Southwest Financial Group and founding Partner of Greenbook Financial Services.
- Rick has instructed on the topics of advanced tax, wealth and business entity planning at Georgia Tech, Duke University, and the University of Texas at Austin. He received 2013 distinguished national award from Wells Fargo Bank and Advisory for partner of the year.
- Rick received a B.S. in Economics from the University of California, San Diego, and also completed an Exchange Program in Applied Economics from Dartmouth College. CA Insurance Lic# 0F76577. Rick resides in the Orlando, Florida area with his wife; Rick also has three grown children.

Private Client Group

Contact us

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