



FOR IMMEDIATE RELEASE

Contact: Carol Graumann
JCPR
973.732.3521
carol@jcpublishrelations.com

Clearbrook Selected by Independent Portfolio Consultants, Inc. as Account Service Provider for IPC's Complete Client Solution

Princeton, NJ, August 10, 2010 — Clearbrook Financial, LLC (“Clearbrook”), is pleased to report that approximately 1400 client accounts with over \$1 billion in client assets advised by Independent Portfolio Consultants (“IPC”), of Boca Raton, Florida, have been successfully transferred from their previous introducing broker-dealer, Jesup & Lamont Securities Corporation, to Clearbrook’s broker-dealer subsidiary, Managed Account Services, LLC (“MAS”). The transfer occurred in May and account conversion is now complete. MAS is an independent broker-dealer that provides introducing broker services, investment solutions, compliance and operational and administrative support to institutions and financial intermediaries worldwide. MAS will provide introducing broker-dealer and administrative services for IPC, including trade and clearing support, fund and asset transfer, regulatory, and related services. IPC client assets will continue to be custodied with First Clearing LLC (“First Clearing”), an affiliate of Wells Fargo Bank.

Alan Bush, IPC Director, stated, “The selection of Clearbrook was based on their extensive knowledge of the managed account industry, their depth of experience in regulatory compliance and risk management, and the opportunity to leverage their institutional asset management research and due diligence. We feel this relationship enhances our offering and provides real benefits to our planners and ultimately their end customers. We have been pleased with the smooth transition of our clients’ assets and the Clearbrook team in completing the transition.”

Clearbrook Managing Principal, John Morris, commented, “We are impressed with IPC’s commitment to support the financial planning community with customized managed account solutions. IPC has a highly talented group of employees, a strong commitment to risk management, a solid investment process and an innovative leadership team well suited for growth. We see multiple opportunities for collaboration going forward. MAS has now passed the \$2 billion client assets milestone, serving select RIAs and family offices. Clearbrook’s approach with RIAs is customized and strategic. We service clients whose business models may vary, but whose dedication to clients’ interests and a strong service model is the common theme.”



About Clearbrook Financial

Clearbrook Financial is an independent investment advisory firm whose core business is to provide investment and strategic advice, investment solutions, and related wealth advisory services to institutions, individuals and financial intermediaries worldwide. As of today, Clearbrook has more than \$30 billion in client assets under advisement and more than \$2 billion in client assets held through its broker-dealer subsidiary, MAS. For more information, visit www.clearbrookfinancial.com.

Securities and brokerage services offered through MAS, Member of [FINRA](#) and [SIPC](#). Investment advisory services offered through CBF Advisors, LLC (“CBFA”). CBFA and MAS are affiliated entities. Services offered by CBFA and MAS may be offered under the “Clearbrook” name for marketing purposes.

About Independent Portfolio Consultants

IPC is in the business of providing investment advisory, consulting and management services to third party correspondents, institutions, and high net worth individuals. They know what it takes to help investment professionals and their clients develop and implement investment management strategies to achieve long-term financial goals. When investment professionals identify clients who need managed account solutions, they go to IPC. IPC works directly with financial advisors who remain actively involved with their clients through each step of the managed account process. They believe that a team approach (financial advisor, IPC consultant, and independent money managers) offers the best platform for a complete client solution. For more information, visit www.ipcanswers.com.

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