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**Marc Rosenthal**

Partner, RCJ Financial Group

Address: 8885 Sheridan Drive, Williamsville, NY 14221

Phone: 716-568-4800

Email: mrosenthal@rcj.com

Web: rcjfinancialgroup.com

Joined company: 2001

Age: 40

Born in: Buffalo

Live in: Williamsville

Education: B.A., University at Buffalo

Spouse: Tricia

Children: Noah, 13; Adam, 10; Ava, 6

**What keeps you interested in your line of work:** Helping our clients identify and achieve their financial objectives through listening and understanding their goals.**Richard Schroeder**

Executive vice president, Schroeder Braxton &amp; Vogt Inc.

Address: 1412 Sweet Home Road, Amherst, NY 14226

Phone: 716-634-6113

Email: richard@sbvfinancial.com

Web: sbvfinancial.com

Joined company: 1999

Age: 57

Born in: Huntington, NY

Live in: Amherst

Education: Binghamton University; University at Buffalo; College for Financial Planning

Children: Amy, 26; Adam, 24; Abby, 10

**What keeps you interested in your line of work:** I find the constantly changing interplay of the vast financial markets system with needs, dreams and goals of our clients to be fascinating. Helping clients meet goals and realize dreams in an uncertain world full of risk is very rewarding.**Buford Sears**

Senior vice president, Specialized Banking and Buffalo Market Executive, First Niagara Bank N.A.

Address: 726 Exchange St., Buffalo, NY 14210

Phone: 716-819-5759

Email: buford.sears@fnbg.com

Web: fnbg.com

Joined company: 2010

Age: 56

Born in: Charleston, W. Va.

Live in: Buffalo

Spouse: Suzy

Children: Rosemary, 27; Newton, 24; Lucy, 23

**What keeps you interested in your line of work:** I enjoy banking because I can truthfully say that I have learned something new every day during my 32-year career in banking.**James Segarra**

Managing partner, Tronconi Segarra &amp; Associates LLP

Address: 6390 Main St., Williamsville, NY 14221

Phone: 716-633-1373

Email: jss@tsaipa.com

Web: tsipa.com

Joined company: 1995

Age: 45

Live in: Williamsville

Education: B.S., accounting, Canisius College

Spouse: Ann

Children: Kallee, 13; Justin, 10

**What keeps you interested in your line of work:** Meeting new business people every day and discovering how our firm can make a difference for their companies.**Joseph Sgroi**

Founder, Sgroi Financial LLC

Address: 965 Union Road, West Seneca, NY 14224

Phone: 716-674-6700

Email: joe@sgroifinancial.com

Web: sgroifinancial.com

Joined company: 1971

Age: 68

Born in: Buffalo

Live in: West Seneca

Education: B.S., University at Buffalo

Spouse: Betty

Children: Patrick, Jeffrey, Jennifer, Gregory

Grandchildren: Timothy, 13; Jake, 9; Emma, 7; Cole, 11; Luca, 8

**What keeps you interested in your line of work:** I love helping people achieve financial independence.**Patrick Sgroi**

President, Sgroi Financial LLC

Address: 965 Union Road, West Seneca, NY 14224

Phone: 716-674-6700

Email: pers@sgroifinancial.com

Web: sgroifinancial.com

Joined company: 1991

Age: 43

Born in: Buffalo

Live in: West Seneca

Education: B.S., business administration, Allied University

Spouse: Christa

Children: Timothy, 13; Jake, 9; Emma, 7

**What keeps you interested in your line of work:** The relationships and ability to help clients become financially independent.**Christopher Shafer**

Senior vice president-branch director, RBC Wealth Management

Address: 6225 Sheridan Drive, Williamsville, NY 14221

Phone: 716-635-8400

Email: christopher.shafer@rbc.com

Web: rbcwm-usa.com

Joined company: 2005

Age: 62

Born in: Stamford, NY

Live in: Williamsville

Education: B.S., business pre law, Bowling Green University

Spouse: Martha

Children: Matthew, 32; Adam, 28; Lindsay, 28; Jessica, 28

**What keeps you interested in your line of work:** It is a fascinating and gratifying profession that changes every day.**Ronald Soluri Sr.**

Managing director, Freed Maxick &amp; Battaglia, CPAs

Address: 800 Liberty Building, Buffalo, NY 14202

Phone: 716-847-2651

Email: ron.soluri@freedmaxick.com

Web: freedmaxick.com

Joined company: 1973

Age: 59

Born in: Niagara Falls

Live in: Grand Island

Education: B.S., Business administration, Niagara University; CPA

Spouse: Lucy

Children: Ronald Jr., Theresa

Grandchildren: 5 grandchildren

**What keeps you interested in your line of work:** Creating growth and opportunity**James Tyrpak**

President, Tyrpak Financial Associates

Address: 6622 Main St., Williamsville, NY 14221

Phone: 716-631-1600

Email: jim@tffinancial.com

Web: tffinancial.com

Joined company: 1988

Age: 54

Born in: Buffalo

Live in: Amherst

Education: B.A., University at Buffalo; M.S., The American College

Spouse: Donna

Children: Michael, 26; Jeffrey, 23

**What keeps you interested in your line of work:** Involvement in industry committees and national professional associations along with the fun of working with ever changing needs of individuals and business clients.**Michael Vadala**

President and CEO, The Summit Federal Credit Union

Address: 100 Marina Drive, Rochester, NY 14626

Phone: 585-453-7000

Email: vadala@summitfcu.org

Web: summitfcu.org

Joined company: 1984

Age: 55

Born in: Syracuse

Live in: Irondequoit, NY

Education: B.S., accounting, Syracuse University

Spouse: Peg

Children: Mary Kate, 22; Michael, 20; Meghan, 15; Marty, 13

**What keeps you interested in your line of work:** Providing a quality employee environment in a growing and financially strong organization that provides affordable financial services to our owner/members.**Cynthia Vance**

Jensen Marks Langer &amp; Vance LLC

Address: 360 Delaware Ave., Buffalo, NY 14202

Phone: 716-352-0170

Email: cvance@jmlwealthplanning.com

Web: jmlwealthplanning.com

Joined company: 1997

Age: 51

Born in: Buffalo

Live in: Orchard Park

Education: B.A., Michigan State University; MBA, Xavier University; J.D., University at Buffalo; CFP

Spouse: Phil

Children: Jack, 15

**What keeps you interested in your line of work:** My clients are the best group of individuals a financial adviser could ever hope to work with.**Thomas Waring**

President, Waring Financial Group

Address: 38 Lake St., Hamburg NY 14075

Phone: 716-648-2412

Email: twaring@waringfinancialgroup.com

Web: waringfinancialgroup.com

Joined company: 1982

Age: 53

Born in: Buffalo

Live in: Hamburg

Education: B.A., SUNY Fredonia; M.S., financial services, The American College

Spouse: Sarah

Children: Tom, 28; Katie, 27; Troy, 27; John, 23

**What keeps you interested in your line of work:** The confidence that our clients have in us and the depth of our relationships.**Daniel Weintraub**

Partner, Lauger Valent Bookbinder &amp; Weintraub LLP

Address: 130 Bryant Woods South, Amherst, NY 14228

Phone: 716-204-9000 ext. 215

Web: lbwcpa.com

Email: dweintraub@lbwcpa.com

Live in: Williamsville

Education: B.S., accounting, University at Buffalo

Spouse: Lisa

**Jonathan Weir**

Principal, Weir Financial Resources

Address: 420 Main St., Buffalo, NY 14222

Phone: 716-854-3343

Email: jweir@weirresources.com

Web: weirresources.com

Joined company: 1997

Age: 43

Born in: Buffalo

Live in: Buffalo

Education: B.A., Boston University; J.D., University at Buffalo

**What keeps you interested in your line of work:** My work helping others financially is a source of pride and the intellectual challenge keeps things interesting.**Matthew Wilkinson**

Director of client service, Arbor Capital Management

Address: 100 Corporate Parkway, Amherst, NY 14226

Phone: 716-446-9111

Email: mjwilkinson@arborcapitalmgt.com

Web: arborcapitalmgt.com

Joined company: 2006

Age: 30

Born in: Pittsfield, Mass.

Live in: Wheatfield

Education: B.S., Duquesne University

Spouse: Lisa

Children: Brady, 3; Ethan, 1

**What keeps you interested in your line of work:** Helping people to maintain their quality of life.**Robyn Young**

CEO, Great Erie Federal Credit Union

Address: 4000 North Buffalo Road, Orchard Park, NY 14127

Phone: 716-662-1311

Email: ryoung@greateriefcu.com

Web: greateriefcu.com

Joined company: 2003

Age: 53

Born in: Buffalo

Live in: Orchard Park

Education: B.A., business administration, Hilbert College; University of Wisconsin CLU/NA Management School

Children: David, 30; Brandon, 29

**What keeps you interested in your line of work:** Credit unions are financial cooperatives that exist to serve its member owners. Our goal is to help each member achieve financial success and that's what we do well, each and every day.**Mark Zeis**

Senior vice president, HSBC Bank USA N.A.

Address: One HSBC Center, Commercial Banking Department, Buffalo, NY 14203

Phone: 716-641-2132

Email: mark.zeis@us.hsb.com

Joined company: 1988

Age: 46

Born in: Buffalo

Live in: Williamsville

Education: B.S., University at Buffalo

Spouse: Michaelene

Children: Madison, 14; Jacob, 11

**What keeps you interested in your line of work:** The interesting people and companies I come across and get an opportunity to interact and work with.**Bruce Zgoda**

Owner, Bruce M. Zgoda CPA

Address: 4848 Smiley Terrace, Clarence, NY 14031-1516

Phone: 716-759-8358

Email: bmc4848@aol.com

Joined company: 1975

Age: 60

Born in: Buffalo

Live in: Clarence

Education: B.S., accounting, University at Buffalo; CPA

Spouse: Cathy

Children: Todd, 35; Scott, 33; Jill, 30

Grandchildren: Alexandria, 9; Ryan, 5; Alex, 3; Samantha, 16 months; Sophia, 7 months

**What keeps you interested in your line of work:** Relationships with so many wonderful people I have met in my career. Hoping I can make a positive difference with the people I have the opportunity to work with.