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Four Firms Honored By Schwab

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By Karen Demasters

Schwab Advisor Services has awarded the 2017 Impact Awards to four firms for outstanding service to the financial industry, Schwab announced Thursday at its annual conference in Chicago.

The four firms receiving the awards serve high-net-worth clients and have advanced the industry through exemplary business practices, visionary leadership, operational excellence and technology innovation, Schwab said.

“These four firms represent what the independent advice industry stands for: an unwavering focus on serving in the best interests of their clients,” said Jonathan Beatty, senior vice president, sales and relationship management, Schwab Advisor Services. Their entrepreneurship, business savvy and innovation makes them important parts of our communities as well as of our industry.”

Schwab gives \$15,000 to charities chosen by the award-winning firms...

...Mainstay Capital Management LLC., a wealth manager based in Grand Blanc, Mich., was recognized with the Trailblazer Impact Award for forging new ground in the independent advice space by combining entrepreneurial spirit with a drive to advance the industry’s interests, said Schwab.

Mainstay Capital has 21 professionals who oversee more than \$2 billion in AUM. In addition to being a full-service wealth manager providing financial planning and portfolio management for workplace savings accounts, IRAs and non-retirement accounts for individuals, Mainstay promotes financial literacy through its MoneyMatters webinar series and supports the next generation of financial advisors, Schwab said...