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U.S. Retirement Partners Acquires Prominent Pennsylvania Firm

Leading 403(b) K-12 Company Joins National Retirement and Benefits Plan Provider

Iselin, NJ, December 18, 2014 – U.S. Retirement Partners (USRP) announced today that it has acquired Kades Margolis Corporation (KMC), a firm that will be part of USRP’s national network of 403(b) providers serving the K-12 public education market. KMC is considered one of the preeminent and most respected retirement planning firms in the country.

Founded in 1974, KMC is headquartered in Wayne, Pennsylvania, and is led by co-founder and President Ed Margolis, and Randy Aranowitz, Executive Vice President. The firm provides retirement planning and benefits services to members of the Pennsylvania State Education Association (PSEA), which has endorsed KMC for 40 years. Over 50 Advisors throughout the state deliver these services to more than 35,000 individual clients in nearly 500 school districts.

In addition to their corporate leadership roles, both have been and continue to be active in the National Tax-deferred Savings Association (NTSA), the industry trade organization. Ed Margolis is a founding member, past President, and past Board Member. Randy Aranowitz is a past President and current member of the Leadership Council.

“We are excited to join USRP. It will create an opportunity for us to provide an even greater number of services to our school district clients and their employees,” said Ed Margolis, President of KMC. Randy Aranowitz, KMC Executive Vice President, commented, “USRP’s practice management programs and tools are very comprehensive. They will enable our Advisors to become more productive, as well as deliver a higher level of service to their clients.”

“KMC is one of the dominant 403(b) providers to school district employees in Pennsylvania. We have known Ed and Randy for more than two decades, and have always admired the high quality organization they have built. We are delighted to have them join the USRP team,” said Bob Dughi, Executive Chairman of USRP.

About U.S. Retirement Partners, Inc.

U.S. Retirement Partners, with headquarters in Iselin, NJ, is the nation’s largest independent K-12 public school and governmental retirement and benefits services firm with over 1,000,000 clients serviced through 25 regional Partner Firms.

Visit www.usretirementpartners.com for more information.