



**ELIZABETH A. THORLEY, MS, CFP[®], CLU[®], AIF[®], AEP[®]
ATTENDS NATIONAL EDUCATION CONFERENCE
for FINANCIAL ADVISORS**

Pittsford, NY (October 22, 2019) - Elizabeth Thorley, CEO & President of Thorley Wealth Management in Pittsford, NY, recently attended a national educational conference for independent financial advisors. Hosted by Commonwealth Financial Network[®], the nation's largest privately held Registered Investment Advisor-independent broker/dealer, the event drew nearly 2,000 affiliated advisors, staff, guests, and sponsors from across the nation. Participants gathered in Denver, Colorado, October 2-5, 2019, where they connected and collaborated with peers, colleagues, and industry partners to strengthen their leadership skills and enhance the high-end service that they provide to clients.

Recognizing the firm's 40-year anniversary, the conference celebrated "where we've been, where we are, and where we're going." Special TED presenters, together with members of Commonwealth's leadership team, shared insights on themes most relevant to advisors, inspiring thinking and sparking creative ideas for the future.

Members of Commonwealth's leadership team addressed attendees. Joe Deitch, founder and chairman, reflected on Commonwealth's 40 years in business. He shared significant lessons learned, including investing in people ("find the fantastic and make them want to stay"), maintaining a client focus, and taking time to get it right ("listen, explore, arrive at clear consensus"). Deitch reflected, "It's not about the money; we trade the money for what's important." On what the future will bring, Deitch inspired attendees to extend Commonwealth's philosophies of quality and community, be leaders, and work toward making a profound difference. "Helping is at the essence of what we do," he noted.

Trap Kloman, president and chief operating officer, discussed how Commonwealth is addressing rapid change across the industry and how its model—built on indispensable service, quality, and community—is designed to elevate advisors' success in this environment. Commonwealth's differentiating purpose is built upon intuitive, integrated technology and personal engagement with knowledgeable employees who are 100 percent accountable to advisors' needs. "We continually invest in the advisor community to bring them closer together and to promote best practices and the sharing of new ideas," said Kloman. "In addition, technology is a key component of Commonwealth's efforts to manage complexity and improve communication." With Commonwealth's spinoff of Advisor360[®], the firm is able to double its technology spend to strengthen the platform and accelerate new features, including broadening the digital experience for advisors and their clients.

Kloman added, "Commonwealth has a history of thoughtfully addressing change to ensure that our advisors are always the best option for their clients. Because our foundation is strong and our value proposition is clear, we minimize having to make dramatic, disruptive decisions. We continue to grow to enable innovation and investment to empower our advisors to be the best in their profession and to own the inside lane." Kloman closed, "I remain accountable to you, our advisors."

In a subsequent general session, Brad McMillan, managing principal, chief investment officer, provided perspective on the markets and economy.

Prominent TED presenters offered topical remarks tailored specifically to the advisor audience. Dr. Elizabeth Dunn, professor and coauthor of *Happy Money: The Science of Happier Spending*, addressed the sense of joy in giving to others; Juan Enriquez, life sciences entrepreneur and author, spoke on “The Future of Man” and the effect that bioscience is having on how we live, work, and do business; Beau Lotto, founder and CEO of Acoustigram, director of the Lab of Misfits, professor, and author, presented on the “Power of Awe,” applying neuroscience research to an immersive presentation; and Baratunde Thurston, comedian, writer, and cultural critic, presented “Opening Your Eyes,” challenging attendees to reimagine our world, create, and “change the story.”

Thorley attended a wide array of educational sessions, panel discussions, and networking events on topics ranging from millennial clients and ESG investing, scaling portfolio management, and cybersecurity and privacy, to leadership and building an inclusive organization, going fee-only, and developing the next generation of advisors.

About Thorley Wealth Management

Thorley Wealth Management has been providing individuals and organizations with financial guidance since 1987. Located at 1478 Marsh Road, Pittsford, NY, the firm prides itself on crafting unique strategies for each client. For more information, please visit www.thorleywm.com. Securities and advisory services offered through Commonwealth Financial Network member FINRA/SIPC, a Registered Investment Adviser. Fixed insurance products and services offered through CES Insurance Agency.

About Commonwealth Financial Network

Founded in 1979, Commonwealth Financial Network[®], Member FINRA/SIPC, is the nation's largest privately held Registered Investment Adviser-independent broker/dealer, with headquarters in Waltham, Massachusetts, and San Diego, California. J.D. Power ranks Commonwealth “#1 in Independent Advisor Satisfaction Among Financial Investment Firms, Six Times in a Row.” The firm supports approximately 1,950 independent financial advisors nationwide. For more information, please visit www.commonwealth.com.

Commonwealth received the highest score in the independent advisor segment of the J.D. Power 2010, 2012, 2013, 2014, 2018, and 2019 Financial Advisor Satisfaction Studies of customers' satisfaction among financial advisors. Visit jdpower.com/awards.