

CONSISTENCY MATTERS

2007 2008 2009 2010 2011 2012 2013 2014 2015

BRIAN D. HOLMES WAS RECENTLY RANKED IN BARRON'S LIST OF THE TOP INDEPENDENT FINANCIAL ADVISORS FOR THE NINTH CONSECUTIVE YEAR



BRIAN D. HOLMES, MS, CFP®, AIF® | *President and CEO*

Brian is one of SEIA's four founding partners. Together they have shared over 19 years of teamwork. SEIA and its affiliates currently manage \$5.0 billion in assets under management as of 10/15/2015. Brian is the only advisor from Los Angeles and Orange Counties to make the elite Barron's list all nine years of its existence, and he was one of only two advisors from Southern California to make the list all nine years. Worth Magazine ranked Brian among the nation's Top 250 Financial Advisors of 2008 and has featured him in 2010-2015's "Leading Wealth & Legal Advisors." Additionally, SEIA has received acknowledgement from:

FORBES
*Top 100 Wealth Manager
in the U.S. 2015*

FINANCIAL TIMES
*Top 300 Registered Investment
Adviser List 2014*

LA BUSINESS JOURNAL
*100 Largest Money
Management Firms 2015*
(ranked by assets managed)

Brian has been in the securities and insurance business for over **30 years** maintaining a successful independent private practice for over 300 clients.

He currently is a **Managing Partner** and Registered Representative of the Century City branch of Signator Investors, Inc.

He is a past member of the **Schwab Institutional Advisory Board** and serves on the **UCLA Department of Economics Board of Visitors** to enhance the curriculum of the Business and Economics major.

Many notable individual clients, executive groups, universities and corporations have retained him for lectures and **private consultations**.

He has been a **Certified Financial Planner®** (CFP®) since 1989, and is also a **Chartered Mutual Fund CounselorSM** (CMFC®) and **Accredited Investment Fiduciary®** (AIF®).

He received his Bachelor of Science degree in Psychology with an emphasis in Business Administration from the University of California, Los Angeles (**UCLA**) in 1983.

He holds a **Master of Science degree** in Financial Planning from the College for Financial Planning.

He has earned the **Accredited Investment Fiduciary** (AIF®) professional designation from Fiduciary360 where he received formal training in investment fiduciary responsibility.

He is a 28 year resident of **Malibu**, California along with his wife, son and daughter.

He is **philanthropically involved** with numerous charities in the Southern California area.

SEIA

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