

## NEWS

For immediate release

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**Charles ("Chip") Roame**  
Managing Principal  
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## Jack Bogle and Mark Casady to be Honored at Tiburon CEO Summit XX

### *Chip Roame to Offer Opening Keynote Presentation*

SAN FRANCISCO (March 15, 2011) -- Tiburon Strategic Advisors, a market research and strategy consulting firm serving a wide variety of financial institutions and investment managers, will hold its twentieth Tiburon CEO Summit, a semi-annual event for executive level clients and special guests, April 13-14, 2011 at the Ritz Carlton Hotel in San Francisco, CA. [Click here to review the tentative client invitee list and agenda.](#)

Tiburon's Managing Principal, Charles "Chip" Roame, will open Tiburon CEO Summit XX by addressing the state of the financial services industry. Mr. Roame's comments will address both current events around the economy and regulatory reform, as well as more secular trends involving products such as exchange traded funds and markets and distribution channels such as breakaway brokers.

Tiburon's CEO Summits have come to support three central themes, including Focusing on Consumer (and Other Client) Needs, Challenging Conventional Industry Wisdom (Innovation), and Taking Responsibility. Tiburon recognizes industry executives who exemplify these attributes.

**At Tiburon CEO Summit XX, Tiburon will present its third annual Tiburon CEO Summit Awards to:**

- Jack Bogle (Founder, The Vanguard Group)
- Mark Casady (CEO, LPL Financial)

**Tiburon CEO Summit XX will also include the following guest speakers:**

- Keith Banks (President, US Trust)
- Charles Brandes (Chairman, Brandes Investment Partners)
- David Carroll (Senior Executive Vice President, Wells Fargo Corporation)
- Ric Edelman (CEO, Edelman Financial Services)
- Ed Finn (President, Barron's)
- Allen Thorpe (Managing Director, Hellman & Friedman)

Tiburon CEO Summit XX will also feature the firm's traditional client-centric panel discussions, a CEO Summit insights panel with four Tiburon clients, five less formal breakout sessions, and two networking-based social events.

"Tiburon's CEO Summits provide a unique opportunity for a select cross-industry group of senior executives to discuss a broad swath of issues regarding the future of the banking, insurance, brokerage, investments, advice, and wealth management businesses," explained Roame. "The CEO Summits provide one of the only true forums where financial services industry CEOs from across traditional industry silos gather to discuss business opportunities. The list of business relationships resulting from prior Tiburon CEO Summits is impressive. This will be our biggest, and perhaps our best, Tiburon CEO Summit to date."

Several long-time Tiburon clients, including Advisor Software, Alston & Bird, Charles Schwab, Dunham & Associates, Envestnet Asset Management, EverBank Financial, Fidelity Investments, Fiserv Investment Services, Genworth Financial Wealth Management, Jefferson National Financial, LPL Financial, Meridian-IQ, State Street Global Advisors, and TD Ameritrade Institutional are offering financial support for Tiburon CEO Summit XX. Media sponsors include American Banker, Bank Investment Consultant, Barron's, Financial Advisor, Financial Planning, Money Management Executive, On Wall Street, Private Wealth, Registered Rep, and Trusts & Estates. "Tiburon is grateful for this assistance," said Mr. Roame.

Tiburon maintains a list of over 3,000 executive-level clients at over 300 companies who have engaged the firm, many of whom have actively participated in prior Tiburon CEO Summits. Attendance at each CEO Summit is limited to 200 executives and is reserved for Tiburon's clients. Tiburon clients who would like to participate in a future Tiburon CEO Summit, please contact Tiburon's Managing Principal Chip Roame for a personal invitation. Prospective clients who are interested in attending Tiburon CEO Summit XX, please contact Sarah Sage at [SSage@TiburonAdvisors.Com](mailto:SSage@TiburonAdvisors.Com) or (415) 789-2540.

Journalists are invited to contact Sarah Sage to schedule an interview with Mr. Roame.

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