

## For Immediate Release:

### Announcing the 2025 Top Directors

### Winners Announced at the Top Directors Award Ceremony

**Chapel Hill, NC, November 10, 2025.** – The winners of the 2025 Top Directors Awards were announced during an award ceremony held November 6 at the Umstead Hotel & Spa near Raleigh, North Carolina. Tim Kehrer, Principal of Kehrer Group, and Chris Melton, National Managing Director at Ameriprise Financial Institutions Group, facilitated the awards ceremony. Ameriprise Financial Institutions Group is presenting sponsor of the 2025 Top Directors Awards.

Kehrer Group received 206 nominations for the 2025 Top Directors Awards from across the financial institution securities and insurance community. Nominees were considered for recognition in one or more categories and were evaluated based on a transparent, [data-driven methodology](#) that rewarded for the performance of the Director's firm across 16 key criteria.

"Not only do Top Directors lead practices that excel in the 16 awards criteria, they deliver in the areas that are most important to their banks and credit unions: attracting and retaining deposits, driving non-interest income, and serving the customers," commented Tim Kehrer.

The 2025 Top Directors Awards recognized investment services directors in banks and credit unions in four categories based upon the number of financial advisors in the practice: Small Firms (firms with fewer than 7 financial advisors), Mid-Size Firms (firms with between 7 and 24 advisors), Large Firms (firms with between 24 and 50 advisors), and Mega Firms (firms with more than 50 advisors).

Additionally, the 2025 Top Directors Awards recognized investment services directors in Credit Unions, Women-Led Firms, and Emerging Firms. The Emerging Firm category differs from the others in that it rewards for improvement in firm performance and is intended to recognize those directors that are leading the fastest growing practices.

Kehrer Group selected [84 finalists](#) for the 2025 Top Directors Awards and recognized the top five firms in each category as [2025 Top Directors Awards winners](#).

**The 2025 Top Directors in Small Firms are:**

- 5. Great Plains Investment Services**  
at Great Plains National Bank  
Director: Zachary Archer
- 4. PSB Investment Services**  
at Princeville State Bank  
Director: Brian Card
- 3. First PREMIER Investment Services**  
at First PREMIER Bank  
Director: Gary Harmelink
- 2. Kirtland Financial Services**  
at Kirtland Credit Union  
Director: Todd Trevino
- 1. Steward Concepts**  
at Family Trust Federal Credit Union  
Director: Matthew G. Griffin

LPL Financial is the sponsor of the Small Firms category.

**The 2025 Top Directors in Mid-Size Firms are:**

- 5. Cathay Wealth Management**  
at Cathay Bank  
Director: Phil Hurst
- 4. Elements Wealth Management**  
at Elements Financial FCU  
Director: Matt Snively
- 3. Towne Wealth Management**  
at TowneBank  
Director: Ken Wren, Jr.
- 2. CCU Wealth Strategies**  
at Corning Credit Union  
Director: Laura Sumner
- 1. CTBC Wealth Management**  
at CTBC Bank  
Director: Michael Lai

Cetera Financial Institutions is sponsor of the Mid-Size Firms category.

**The 2025 Top Directors in Large Firms are:**

- 5. Associated Investment Services**  
at Associated Bank  
Director: David Kuipers
- 4. Hancock Whitney Financial Consultants**  
at Hancock Whitney  
Director: Keith LeBlanc
- 3. ESL Investment Services**  
at ESL FCU
- 2. Addison Avenue Investment Services**  
at First Tech Federal Credit Union
- 1. FirstBank Investment Partners**  
at FirstBank  
Director: Tripp Thompson

The Standard is the sponsor of the Large Firms category.

**The 2025 Top Directors in Mega Firms are:**

- 5. Regions Investment Services**  
at Regions Bank  
Director: Brian G. Greve
- 4. Synovus Securities, Inc,**  
at Synovus Financial  
Director: Rob Varner
- 3. First Horizon Advisors, Inc.**  
at First Horizon Bank  
Director: Martin De LaREAL
- 2. Fulton Financial Advisors**  
at Fulton Bank  
Director: Michael George
- 1. Key Investment Services**  
at Key Bank  
Director: Solomon Schmidt

Midwood Financial Services is the sponsor of the Mega Firms category.

**The 2025 Top Directors in Women-Led Firms are:**

- 5. Numerica Financial Services**  
at Numerica Credit Union  
Director: Nancy Almond
- 4. BCU Wealth Advisors**  
at BCU  
Director: Kristi Mertens
- 3. North Shore Investment Services**  
at North Shore Bank  
Director: Erika Milosevich
- 2. Northwest Financial Advisors LLC**  
at Northwest Federal Credit Union  
Director: Karen Benedict
- 1. CCU Wealth Strategies**  
at Corning Credit Union  
Director: Laura Sumner

**The 2025 Top Directors in Emerging Firms are:**

- 5. Kearny Investment Services**  
at Kearny Bank  
Director: Mike Reilly
- 4. California Credit Union Wealth Management**  
at California Credit Union  
Director: Brian Venn
- 3. Wealth Management at UW Credit Union**  
at UW Credit Union  
Director: Teo Trandafir
- 2. Empeople Investment & Retirement Services**  
at Empeople Credit Union  
Director: Brad Johannes
- 1. A+ Wealth Management**  
at A+ Federal Credit Union  
Director: Aaron Persons

**The 2025 Top Directors in Credit Unions were announced during the 2025 PROCU Conference in San Diego, CA on September 16. The 2025 Top Directors in Credit Unions are:**

- 5. Kinecta Wealth Management**  
at Kinecta Federal Credit Union  
Director: Frank Rehhaut
- 4. ESL Investment Services**  
at ESL FCU
- 3. Elements Wealth Management**  
at Elements Financial FCU  
Director: Matt Snively
- 2. CCU Wealth Strategies**  
at Corning Credit Union  
Director: Laura Sumner
- 1. Addison Avenue Investment Services**  
at First Tech Federal Credit Union

TruStage is sponsor of the Credit Unions category.

### **About the Top Directors Awards**

Since 2021, the Kehrer Group Top Directors Awards has celebrated leading financial services executives from across the financial institution insurance and securities community. We use a uniquely transparent, data-driven process to determine the Top Directors, consistent with our position as an independent, third-party research and consulting firm. We apply that methodology to a diverse group of nominees that cross broker dealers, delivery models, and institution size. You can learn more about the methodology behind the 2025 Top Directors Awards [here](#).

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### **About Kehrer Group**

Kehrer Group is the bank and credit union financial advice community's trusted partner for original thought leadership, insight based in data, and strategies that drive success. Drawing insight from data and leveraging those insights against the challenges facing our clients is at the core of everything Kehrer Group does. For more information, visit our website at [www.kehrergroup.com](http://www.kehrergroup.com).

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**The 2025 Kehler Group Top Directors Awards are presented by  
Ameriprise Financial Institutions Group**

