

**FOR IMMEDIATE RELEASE**



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**ALEX KATZ JOINS OPES ADVISORS AS VICE PRESIDENT OF  
BUSINESS DEVELOPMENT FOR WEALTH MANAGEMENT DIVISION**

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**PALO ALTO, CA – June 11, 2012** – Opes Advisors, an innovative wealth management and mortgage banking firm, is pleased to announce Alex Katz has joined the firm’s Wealth Management division as Vice President of Business Development. Alex will lead strategic and tactical planning, sales development and market share growth, and manage the firm’s team of Wealth Advisors. Prior to joining Opes Advisors, Alex held Group Vice President positions for more than 10 years with Fisher Investments where he led their Sales, Trading and Investment Operations, and Research divisions.

“Alex has an exceptional record in financial services and brings strong experience to Opes Advisors. He will be a significant asset in further strengthening the firm’s unique wealth management offer and leading our team of Wealth Advisors,” said Mark Duvall, Opes Advisors Chief Investment Officer. Drawing upon his successful career experience, Alex is well positioned for his role at Opes Advisors. "I am thrilled to join this innovative team. The expertise the firm has in integrating real estate as an asset class into the investment management portfolio for a complete view of clients’ personal balance sheet, and their pioneering approach to financial decision planning, is unique within the industry. Coupled with their global investing and asset allocation strategies, Opes Advisors is redefining how to effectively prepare for retirement,” said Alex.

Alex is a Series 65 investment advisor representative and he holds a BA in psychology from Dartmouth College.

**About Opes Advisors**

Opes Advisors is an innovative wealth management and mortgage banking firm dedicated to helping clients make effective choices that support their financial goals. Working with our integrated team of advisors, wealth management clients receive comprehensive financial planning, investment management, unbiased and non-commissioned real estate investment advisory services, and expertise in real estate financing. Our innovative financial decision planning process enables clients to see clearly the tradeoffs of their financial decisions to grow, preserve and manage their wealth – and ways of shifting their financial balance sheet over time to best be positioned for a financially secure retirement. Opes Advisors has offices throughout California as well as Eugene, Oregon. Learn more at [www.opesadvisors.com](http://www.opesadvisors.com).

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