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ROCHESTER/SYRACUSE FINANCIAL

TEARING DOWN financial industry norms

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Whereas some firms have shut their doors rather than comply with recent regulatory changes in this volatile industry, Excel Vice President and COO Terrence Britt and his colleagues didn't have to




change much at all; acting in their clients' best interests has always been a smart, ethical way to build a strong and enduring company.

"The Excel philosophy can be boiled down to three key words: 'taming the chaos.'" says Britt. "We are a smaller firm; our accessible size continues to serve us, our clients, and our advisor-partners extremely well. Many of the companies we compete with build their businesses by only adding people to do tasks. Here at Excel, our growth has been strategic and thoughtful, relying on the game-changing technological developments that have transformed this industry in the past decade."

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Excel Securities
ASSOCIATES, INC.

200 Canal View Blvd., Suite 204
Rochester, NY 14623
(800) 323-3746