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STEPHANIE CHEDID, AIF[®], TO PRESENT AT LEADINGAGE[™] ANNUAL MEETING AND EXPO ON CONTINUING CARE RETIREMENT COMMUNITIES (CCRCs) OBTAINING A CREDIT RATING

Milwaukee, Wisconsin, October 15, 2014 – Stephanie Chedid, AIF[®], President of Cleary Gull Advisors, will present at the LeadingAge[™] Annual Meeting and Expo, [Re]Defining Age. The meeting will take place from October 19 to 22, 2014 in Nashville, Tennessee and will address the topic of obtaining and maintaining a credit rating. Chedid will present with Jennifer Anderson, Chief Financial Officer of Kendal on Hudson, and Jim Bodine, Executive Vice President of Herbert J. Sims. The LeadingAge[™] Annual Meeting and Expo is the largest aging services show in the country.

The presentation, “Getting Rated: An Integrated Planning Approach” will address the credit rating process for CCRCs including best practices, the benefits of assembling the right team, and the advantages of obtaining a rating. The panel will also present a case study featuring Kendal on Hudson’s recent credit rating experience. The trio will present on Monday, October 20th.

Said Chedid, “We think sharing our experience and best practices to obtain a credit rating for our client will be beneficial to other CCRCs in attendance. Many CCRCs are interested in understand the credit rating process, or how it can help their organization obtain fixed-rate debt, limit interest rate and refinancing risk, and contribute to stronger financial performance.”

Attendees can register to participate in the session and download a copy of the presentation at the conference website. To view details of the session at [click here](#).

About Cleary Gull

Cleary Gull (www.clearygull.com) is an employee-owned firm headquartered in Milwaukee, Wisconsin providing specialized financial services through two operating divisions: Investment Advisory and Investment Banking. Cleary Gull was named by *Financial Times** to their 2014 list of 300 top registered investment advisors in the U.S. Cleary Gull has combined assets under management of \$2.5 billion as of June 30, 2014 and focuses on high net worth individuals, pilots, and not-for-profit hospitals and senior living communities across the nation. Cleary Gull’s investment bankers specialize in providing exclusive advice on sales, mergers, acquisitions, private debt and equity capital placement, typically for transactions from \$10 million to \$200 million.

***About the 2014 Financial Times 300 Top Registered Investment Advisers List**

Being named to the “300 Top Registered Investment Advisers” list is not an endorsement of the adviser, is not indicative of the adviser’s past or future performance, and does not ensure that a client will experience a higher level of performance or results. Third party rankings and recognition from ratings services are no guarantee of future investment success and should not be construed as representative of any one client’s evaluation. The



Financial Times solicited from more than 2,000 independent registered investment advisory firms; more than 600 (or approximately 30%) of the firms solicited completed and submitted the questionnaire; 300 (or approximately 50%) of the participating firms were selected for the list. To be considered, advisers solicited by the *Financial Times* completed and submitted a questionnaire about their practice. Only those that completed the questionnaire were considered for the list. To qualify for the list, advisers must be registered with the SEC and have at least \$300 million in verified assets under management as of 12/31/13, with no more than 75% of a firm's assets being institutional. The *Financial Times* graded advisory firms that were considered for the list on six broad factors and calculated a numeric score for each advisor. Areas of consideration included AUM, AUM growth, years the firm has been in existence, industry certifications of staff, SEC compliance record, and online accessibility. The list is independently determined by the *Financial Times*. The registered investment advisory firms are not charged a fee for consideration or selection.

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