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## OPES ADVISORS ANNOUNCES ALLIANCE WITH LANDMARK MORTGAGE GROUP TO EXPAND REACH TO TRI VALLEY

**PALO ALTO, CA, United States – May 5, 2010** – Opes Advisors, a residential mortgage banking and wealth management firm, announced today that it has formed a strategic partnership with Landmark Mortgage Group. This cooperative effort will allow Opes Advisors to establish a footprint in the Tri Valley region through Landmark’s experienced group of mortgage advisors. Furthermore, with access to Opes Advisors’ wealth management division, Landmark can help clients ensure that their loan structure supports their long term financial goals.

“The combined efforts of our companies will allow us to help more clients to define and achieve their financial goals,” said Susan McHan, Co-founder, President and CEO of Opes Advisors. “The financial expertise and insights we provide to our mortgage clients is something that they find valuable and, because it is an integral part of our comprehensive mortgage services, it comes with no more cost than obtaining a mortgage from a conventional firm. In fact, as a mortgage bank, we underwrite, process and fund our loans. This keeps our cost of funds lower, and allows us to remain extremely competitive and efficient.”

Opes Advisors’ wealth management team includes Chartered Financial Analysts® (CFA®) and Certified Financial Planners™ (CFP®), which means they are experienced in the details of financial planning, securities and analysis and are held to a fiduciary standard of care and diligence that far exceeds industry norms.

“Our team is thrilled with becoming a division of Opes Advisors. Most importantly, our clients will be the big winners of this association, given the extensive, ultra-competitive direct lending platform we can provide,” said Todd Allen, a founder of Landmark Mortgage Group. “And, unlike most other mortgage firms, Opes has wealth management expertise in house. Working with Opes Advisors’ wealth management team will let us offer our clients a depth of service that traditionally hasn’t been very accessible.”

### **About Landmark Mortgage Group**

Landmark Mortgage Group, founded by Rick Benitez, Tony Russo and Todd Allen, is a mortgage banking firm specializing in residential lending with offices in Pleasanton and Livermore. Through the company’s previous mortgage banking platform, the flagship Livermore office generated over \$130 million in loan volume in 2009. Loan programs available include

conventional, equity lines, as well as forward and reverse government programs. The company has immediate plans to open a location in Santa Cruz by mid-2010. <http://www.lmg lending.com>

**About Opes Advisors**

Opes Advisors is a premier financial advisory firm specializing in Wealth Management and Residential Mortgage Banking in the Greater Bay Area. Opes provides comprehensive advisory services in personal finance management including investment management, real estate financing and strategic tax and financial planning. Locations include Los Gatos, Marin, Palo Alto, San Diego, San Mateo and Eugene, Oregon. <http://www.opesadvisors.com>

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