



Martin J. Kossoff  
CFP® / AIF®  
Principal, Chairman  
CERTIFIED FINANCIAL PLANNER™

In his current role as Chairman, Marty focuses on enhancing the company's performance, growth and efficiency. Marty was President of Allegiant Private Advisors from 1998 through 2018. He served as primary advisor to all clients and managed the firm's day-to-day operations and strategic growth for two decades as the company developed its unique team approach to customized wealth management. Prior to moving to Sarasota with his family in 1997, Marty led the Private Bank at Wells Fargo in San Francisco, an office with \$25 billion under management. He enjoys advising local non-profit organizations and currently serves on and consults with several non-profit boards. Marty continues to lecture at national conferences for the industry. He is a CERTIFIED FINANCIAL PLANNER™ and an Accredited Investment Fiduciary®. Marty was named to Forbes magazine's "Best-in-State Wealth Advisors" list for 2020.\* He was also previously recognized by both Barron's magazine (in 2013 and 2014)\*\* and The Financial Times (in 2013)\*\*\* as one of the top advisors in the United States.

ALLEGiant  
PRIVATE ADVISORS  
CUSTOMIZED WEALTH MANAGEMENT

Email [marty@allegiantpa.com](mailto:marty@allegiantpa.com)

Telephone (941) 365-3745 Toll Free (800) 926-5237 Fax (941) 953-7430 Visit [allegiantpa.com](http://allegiantpa.com)  
240 South Pineapple Avenue, Suite 200 Sarasota, Florida 34236

Advisory Services offered through Allegiant Private Advisors, LLC, a Registered Investment Adviser

\*The 2020 ranking was developed by SHOOK Research, based on meetings to evaluate each advisor qualitatively and on a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations, and other quantitative criteria. Overall, 32,000 advisors were considered, and 4,000 (12.5 percent of candidates) were recognized. This award is not indicative of the advisor's future performance. Your experience may vary. Some states may have more advisors than others. SHOOK does not receive a fee in exchange for rankings.

\*\*To compile this annual list, Barron's uses data provided by advisors. Barron's takes a number of criteria(1) into account for this state-by-state ranking, including assets under management(2); revenues generated by advisors for their firms; quality of practices, which includes examination of regulatory records; and philanthropic work. Overall in 2014, 3,000 advisors were considered, and 1,200 (40 percent of candidates) were recognized. Some states may include more advisors than others, in proportion to state populations. This award is not indicative of the wealth manager's future performance. Your experience may vary. (1) Investment performance is not a criterion. (2) Managed through Commonwealth.

\*\*\*To compile the 2013 list, the Financial Times evaluated nominees on six primary areas and calculated a numeric score for each advisor. The areas of consideration were assets under management (AUM), asset growth, compliance record, experience, credentials, and accessibility. Approximately 960 qualified applications were received; 400 advisors were selected, representing 41.6 percent of applicants. Not indicative of advisor's future performance. Your experience may vary. For the full methodology, please visit [ft.com](http://ft.com).