

A graphic consisting of a large, dark blue circle with a white crescent shape inside, creating a ring-like effect. The words 'Press Release' are centered within the white space.

Press Release

OPPENHEIMER GROWS NORTH CAROLINA PRESENCE WITH NEW BRANCH MANAGER

New York, August 8, 2018 – [Oppenheimer & Co. Inc.](#) (“Oppenheimer”) – a leading investment bank, wealth manager, and a subsidiary of Oppenheimer Holdings (NYSE: OPY) – today announced Nelson Kelly has been appointed Branch Manager of the Firm’s Winston-Salem, North Carolina office. Kelly will oversee the branch and provide leadership and strategic counsel for clients in the region. This is the second prominent Branch Manager announcement for the Firm in North Carolina following the recent appointment of [Bill Pomeroy](#) in the Asheville office.

“North Carolina is an important market to Oppenheimer and Nelson is critical to our growth in this area,” said Mark Whaley, Executive Vice President and Head of Oppenheimer’s Private Client Division. “We’re seeing more financial advisors offer an array of services outside traditional portfolio management. These expanded skillsets require a new type of leadership, which is where Nelson provides tremendous value. His unparalleled experience in the space and broad financial acumen includes employee benefits, options strategies, insurance analysis and portfolio design. We’re thrilled to welcome such an experienced professional to Oppenheimer.”

Kelly brings more than 30 years of experience to the role. He joined Oppenheimer in 2017 after spending five years with SunTrust Investment Services. Earlier in his career, he held prominent roles at top financial institutions, including First Union, Wachovia, and Wells Fargo Advisors.

“As a financial advisor myself, I understand the complex challenges and opportunities today’s advisors face, including a changing regulatory landscape and the tremendous transfer of wealth from one generation to the next,” commented Kelly. “With all these opportunities, our clients are turning to the esteemed advisors at our Firm for help making important financial decisions that could impact the rest of their lives. I’m honored to lead this branch and help these advisors provide important counsel to our clients.”

Kelly holds a B.S. in Business Administration (Economics) from The University of Tennessee and the coveted Chartered Life Underwriter (CLU®) and Chartered Financial Consultant (ChFC®) designations from the American College of Financial Planning.

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Oppenheimer & Co. Inc.

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