



VSR Timeline

- **March 1, 1985:** VSR opens with Ken Spencer, Don Beary, Mike Stanfield and Mike Holmes as Principals.
- **1986:** Tax Reform Act.
- **October 1987:** Stock Market Crash.
- **June 1989:** Jim Ramel joins VSR and replaces Mike Holmes as a Principal.
- **January 1990:** VSR starts new decade with \$4 million in revenues and 185 Reps.
- **February 1991:** Mike Stanfield becomes President/CEO.
- **1990s:** VSR Product Mix: Mutual Funds, Variables and Trade Desk lead revenues.
- **June 1993:** The Masters is licensed as an RIA.
- **October 1995:** Hires first RVP, Ken George, to build the Texas Region.
- **December 1995:** Ken Spencer retires.
- **October 1996:** VSR moves from Leawood to new offices in Overland Park.
- **1996:** VSR exceeds \$10 million in annual revenue.
- **January 1997:** VSR initiates first E & O Policy with prior acts coverage to 12-31-94.
- **September 1998:** VSR begins clearing relationship with FCC.
- **1999:** VSR crosses \$20 million in annual revenue with 24 home office staff.
- **January 2000:** VSR begins new decade with 214 Reps, 33 home office staff and \$26.5 million in revenues.
- **April 2001:** Jim Ramel retires.
- **October 2001:** Eileen Quint becomes Chief Financial Officer.
- **2002:** VSR crosses \$30 million in annual revenue with 35 home office staff.
- **2003:** VSR exceeds \$40 million in annual revenue with 40 home office staff.
- **October 2004:** Don Beary named Chairman of the Board for VSR.

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- **March 2005:** VSR celebrates 20th Anniversary with Hawaii Awards Conference.
 - **October 2005:** Maureen McAnarney becomes VSR's first Chief Operating Officer.
 - **2005:** VSR crosses \$60 million in annual revenue.
 - **December 2005:** VSR finishes year with 10 Reps over \$1 million in securities production.
 - **2006:** VSR exceeds \$80 million in annual revenue.
 - **December 2006:** VSR finishes year with 13 Reps over \$1 million in securities production.
 - **January 2007:** VSR begins the year with 263 Reps and 73 home office staff.
 - **June 2007:** VSR is ranked as #1 in *Investment Advisor's* Top 25 Independent Broker/Dealer list for highest average production per Rep.
 - **December 2007:** VSR finishes the year with 19 Reps over \$1 million in securities production.
 - **June 2008:** Jon Stanfield named to VSR's Board of Directors.
 - **January 2009:** VSR Reps earn 9.5% of the company with stock appreciation rights.
 - **March 1, 2010:** VSR celebrates the firm's 25th anniversary.
 - **June 29, 2011:** VSR names Maureen McAnarney and Jon Stanfield as Co-Presidents.
 - **December 2012:** VSR finishes the year by setting a new all time record in revenues for the firm: \$99.3 million.