

# mgo } HISTORY

Jack Moskal founded J.D. Moskal & Assoc., which soon after became Moskal Jaras & Assoc.



Eugene M. Klein & Co., Inc. was founded by Eugene M. Klein



Jack Moskal establishes Capital Planning Corp., one of the first to coin term 'financial planner'

E.M. Klein installed our first 401(k) plan



Michael Moskal joined Moskal Jaras & Assoc.

Eugene M. Klein & Co., Inc. merged with Moskal Jaras & Assoc. to become Moskal Klein, Inc.

Ted Triska joined Moskal Klein, Inc.



Moskal Klein, Inc., rolls out the Total Solution Retirement Plan



Assets under management reach \$100,000,000

Assets under management reach \$250,000,000

MGO rolled out Road to Wealth personal investment program

MGO Road to Retirement program reaches \$120,000,000 in assets

MGO launches 'Signature' personal wealth mgmt for high net worth individuals

Assets under management reach \$575,000,000

2000s

1990s

1980s

1970s

1960s

1930s

Willard Weiss takes over Eugene M. Klein & Co.



Willard Weiss sold Eugene M. Klein & Co. to a group including Richard Weiss, Willard's son



Paul Orchosky joined E.M. Klein & Co.



Ron Gross joined Moskal Jaras & Assoc.



Lisa Peterson joined Moskal Klein, Inc.



Scott Lepa joined Moskal Klein, Inc.

Firm becomes Moskal Gross Orchosky, Inc.



MGO rolled out Road to Retirement managed account program

Assets under management reach \$575,000,000

2014