



## Edward Margolis

*Executive Chairman*

*Kades~Margolis Corp.*

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Ed Margolis' professional career spans more than 40 years in the insurance and financial services industry. He is considered a forerunner, an innovator, and a respected leader in the 403(b) marketplace. The National Tax Sheltered Account Association (NTSAA) recognized his contributions to the association and to 403(b) and 457 markets by awarding him with the 2013 Bob Schiller Meritorious Service Award. Mr. Margolis is one of the founders and a past president of NTSAA, America's premier professional association serving the 403(b) marketplace. In November 2023, Ed transitioned from President and Managing Partner of KMC to Executive Chairman.

In 1972, Ed Margolis and Larry Kades, his former partner, founded Kades-Margolis Corporation. They began working with educators and school employees to offer retirement savings and insurance products. One of their major goals was to earn the Pennsylvania State Education Association's (PSEA) endorsement for 403(b) tax-deferred annuity programs. They met with many officials and members throughout the state and shared their vision and the Kades-Margolis' story. Their hard work paid off. In 1974, PSEA endorsed Kades-Margolis Corporation as the exclusive marketer of tax-deferred annuities for its members. Today, Kades-Margolis Corporation is one of the leading financial services and retirement planning organizations in the country. It serves clients in Pennsylvania, New Jersey, and Delaware.

Mr. Margolis is a graduate of Coatesville Area High School. In 1962, Ed graduated from the University of Pennsylvania. He is a trustee of his synagogue, Beth Israel Congregation of Chester County, Pennsylvania, and he lives with his wife and daughter in Villanova, PA.