

ADVISOR SUPPORT TEAM

Jani Gillman
Team Leader

Connie Barron, New accounts, account maintenance & cashiering

Curtis Jones, Training, ModestSpark, EnvestNet

Jani Gillman, Advisor support, oversight & escalation

Joseph Wren, Advisor Support Associate

Valerie Malo-Bialek, New accounts, account maintenance & cashiering

ASSET MANAGEMENT

Morgan Sizer
Team Leader

Bill Sowell, Oversight & advisory

Chris Clark, Asset Management Associate

Morgan Sizer, Trading & research

Thomas Knight, Trading Coordinator

Keith Krueger, Admin

COMPLIANCE

Jeremy Stalcup
Team Leader

Bill Sowell, Oversight & advisory

Jeremy Stalcup, Marketing approval, registrations & disclosures

Mike Bates, Marketing approval, registrations & disclosures

DATA MANAGEMENT TEAM

Lindsay Oberle
Team Leader

Abby Sowell, Technology Coordinator

Lindsay Oberle, Portfolio Center, reconciliation & billing

Maria Krueger, SalesForce, advisor communication

Sajjad Sabeel, Data Analysis and Email Support

FINANCIAL & HR

Keith Krueger, COO / CFO
Team Leader

Alayna Smith, Payroll and general accounting

Cindy Sowell, HR

Keith Krueger, Oversight

HOME OFFICE

Kelly Currence, Reception / Home Office Support

Kim Wilson, Business Coordinator, EOS Implementor

**ONBOARDING / RELATIONSHIP
SUPPORT TEAM**

Ryan Willson
Team Leader

Jani Gillman, Transition processing

Ryan Willson, Transition planning & preparation

SALES / MARKETING SUPPORT

Matt Estes, VP Business Development
Team Leader

Abby Sowell, Marketing Coordinator

Cindy Sowell, Event planning & travel

Chuck Hicks, President, Advisor communication, proposals & recruiting

Matt Estes, Advisor communication, proposals & recruiting

Patrick Jones, Creative services, design & marketing