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DEVON BANNING, CFP®

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Executive Assistant to the President

KATIE SCHOLD

Human Resource Finance Officer **KATHY HERGET**

Senior Client Operations Specialist

GINA ALBERGO

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CHRISTIAN PINEDA

Administrative Specialist

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CHELSEA GANEY, CFA

Chief Strategy Officer

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VP of Corporate Strategy
Portfolio Manager

TYLER HARDT, CFAChief Portfolio Manager

SHANE XU

Portfolio Manager

GAVIN SCHELL

Investment Analyst

EFTINA COMA

Investment Analyst

JUSTIN ROTH
Investment Analyst

ISABELLA ARIAS

Investment Analyst

ARIAN MIRFAKHRAEE

Portfolio Manager

LAUREN NIEBRUGGE

AMD Operations Associate

PETE HARTMAN

Senior AMD Operations Associate

CLIENT RELATIONS

ANGEL NURSE

Vice President | Senior Client Relationship Manager STEFANIE DRACK, AIF®

Senior Client Relationship Manager LUCCA DELCOMPARE, AIF®

Senior Client Relationship Manager

MIA SAFRON

Client Relationship Manager

MEAGAN HERNANDEZ

Client Operations Specialist

JASMINA TOWNSEND

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VIELKA BUREY, CFP®

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