

**THOMAS M. MORAN AIF®**  
Chairman | CEO | CIO

**ADVICE & PLANNING**

**DONALD DRURY**  
President

**KYLEN MORAN**  
Chief Marketing Officer

**CHARLES CHESEBROUGH, CFA®**  
Senior Vice President

**MICHAEL MONGIN**  
Senior Vice President

**AARON SIMPSON**  
CFP®, CLU®, ChFC®, RICP®  
Senior Vice President

**JULIE RICH**  
Senior Vice President

**COREY GRANT, CFP®, ChFC®**  
Vice President

**RYAN FRANK, CFP®, ChFC®**  
Vice President

**MARGARET KARR**  
Vice President

**PRACTICE MANAGEMENT & ADMINISTRATION**

**ASHLEY BUBOLTZ**  
Chief Compliance Officer

**MARISSA PLUMMER**  
Marketing Manager

**DAWN BARAKETT**  
Senior Administrative Associate

**KIM KOERT**  
Training & Operations Manager

**JEFFREY LEBRITON**  
Executive Assistant  
to the President

**KATHY HERGET**  
Senior Operations Associate

**GINA ALBERGO**  
Marketing Associate

**KATIE SCHOLD**  
Human Resource Officer  
Client Associate

**STRATEGY & RESEARCH**

**EARL SISTRUNK, CFA®**  
Senior Portfolio Manager

**CHRISTINA SHAW, CIPM, CQF**  
Chief Trading Officer

**CHELSEA GANEY, CFA®**  
Chief Strategy Officer

**PATRICK MORAN**  
Portfolio Manager  
Vice President of Corporate Strategy

**SHANE XU**  
Investment Analyst

**GAVIN SCHELL**  
Investment Analyst

**CLIENT RELATIONS**

**ANGEL NURSE**  
Senior Vice President  
Client Relationship Manager

**KIM CREWS**  
Senior Client Associate

**LAUREN NIEBRUGGE**  
Senior Client Associate

**MIA SAFRON**  
Client Associate

**STEFANIE DRACK**  
Client Associate

**LUCCA DELCOMPARE**  
Client Associate

**JAMES PHELPS**  
Client Associate

**CHRISTIAN PINEDA**  
Client Associate

**MEAGAN HERNANDEZ**  
Client Associate

**JASMINA TOWNSEND**  
Client Associate

**KORINA GAINEY**  
Client Associate