

THOMAS M. MORAN AIF®
Chairman | CEO | CIO

ADVICE & PLANNING

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President

KYLEN MORAN
Chief Marketing Officer

CHARLES CHESEBROUGH, CFA®
Senior Vice President

MICHAEL MONGIN
Senior Vice President

AARON SIMPSON
CFP®, CLU®, ChFC®, RICP®
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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

CHRISTINA SHAW, CIPM, CQF
Chief Trading Officer

CHELSEA GANEY, CFA®
Chief Strategy Officer

SHANE XU
Investment Analyst

PATRICK MORAN
Vice President of Corporate Strategy
Portfolio Manager

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