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MICHAEL MONGIN, CPWA®
Senior Vice President

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CFP®, CLU®, ChFC®, RICP®
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JULIE RICH
Senior Vice President

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Vice President

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Vice President

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Marketing Manager

KIM KOERT
Training & Operations Manager

JEFFREY LEBRITON
Executive Assistant
to the President

KATIE SCHOLD
Human Resource and
Finance Officer

KATHY HERGET
Senior Operations Associate

GINA ALBERGO
Marketing Associate

STRATEGY & RESEARCH

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CHELSEA GANEY, CFA
Chief Strategy Officer

PATRICK MORAN
Vice President of Corporate Strategy
Portfolio Manager

TYLER HARDT, CFA
Senior Portfolio Manager

SHANE XU
Investment Analyst

GAVIN SCHELL
Investment Analyst

EFTINA COMA
Investment Analyst

JUSTIN ROTH
Investment Analyst

ARIAN MIRFAKHRAEE
Portfolio Manager

Lauren Niebrugge
AMD Operations Associate

CLIENT RELATIONS

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Client Relationship Manager

KIM CREWS
Senior Client Associate

STEFANIE DRACK
Client Associate

JAMES PHELPS
Client Associate

MIA SAFRON
Client Associate

LUCCA DELCOMPARE
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