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Managing Director | Head of Quantitative Strategies

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RYAN FRANK, CFP®, ChFC®, SE-AWMA™
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Financial Consultant

TRENT GRZEGORCZYK
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TIMOTHY O'LEARY
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Compliance Officer

MARISSA PLUMMER
Marketing Manager

JEFFREY LEBRITON
Executive Assistant
to the President

KATIE SCHOLD
Human Resource
Finance Officer

KATHY HERGET
Senior Client Operations Specialist

GINA ALBERGO
Marketing Associate

CHRISTIAN PINEDA
Administrative Specialist

ASSET MANAGEMENT

CHRISTINA SHAW, CIPM, CQF
Chief Data Officer

CHELSEA GANEY, CFA
Chief Strategy Officer

PATRICK MORAN
VP of Corporate Strategy
Portfolio Manager

TYLER HARDT, CFA
Chief Portfolio Manager

SHANE XU
Vice President
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
Client Service Specialist

DENISE KOTE, AIF®
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BEN HERMISTON
Client Service Specialist

ADAM MASTERSON
Client Service Specialist

ALISHA DANNO
Client Operations Specialist

CHARLIE SONALIA
Client Operations Specialist