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Managing Director | Head of Quantitative Strategies

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**CFP®, CLU®, CHFC®, RICP®**  
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**JULIE RICH, CFP®**  
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**COREY GRANT, CFP®, CHFC®**  
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**RYAN FRANK, CFP®, CHFC®, SE-AWMA™**  
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**DEVON BANNING, CFP®**  
Financial Consultant

**TRENT GRZEGORCZYK**  
Senior Vice President

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Chief Compliance Officer

**TIMOTHY O'LEARY**  
Vice President  
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, AIF®**  
Administrative Specialist

**ASSET MANAGEMENT**

**CHRISTINA SHAW**  
**CIMA®, CIPM, CQF**  
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**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

**PETE HARTMAN**  
Senior AMD  
Operations Associate

**LAUREN NIEBRUGGE**  
AMD Operations Associate

**CLIENT RELATIONS**

**STEFANIE MURRAY, 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®**  
Client Operations Specialist

**BEN HERMISTON**  
Client Service Specialist

**ADAM MASTERSON**  
Client Service Specialist

**CHARLIE SONALIA**  
Client Operations Specialist

**KAITLIN POTERACK**  
Client Service Specialist