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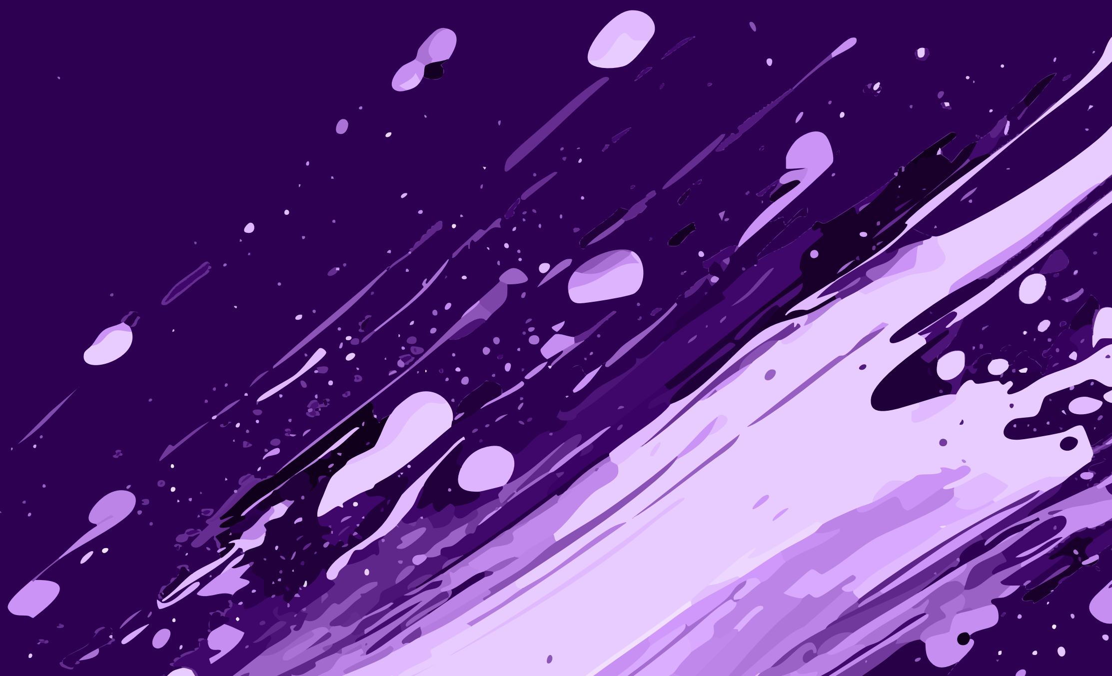

Dan Amaradio

Dan is one of the senior members of the Select Portfolio Management, Inc. team. As one of the more experienced Advisors, with over 40 years of experience, his clients look to him for his in-depth knowledge of the wealth management process. As a CERTIFIED FINANCIAL PLANNER™, Dan has used his expertise to help clients with their overall planning to meet their financial goals and objectives within the realm of asset management, investing, tax planning, estate planning, insurance, and retirement planning. He prides himself with thorough communication and service to his clients as well as answering technical questions on the markets, the economy, and the management of their portfolios.

Select Portfolio Management | dan@selectportfolio.com
Aliso Viejo, California

Semir Amin

Semir joined Select Portfolio Management, Inc. in 2005 and leverages over 40 years of experience in the financial services industry to employ a broader, more integrated, and comprehensive method as part of his client needs-based approach in his role as Advisor and Portfolio Manager. Semir is responsible for in-depth analysis of stock portfolios.

Semir also excels in his knowledge of the bond markets. His years of experience allow him to provide the firm with in-depth analysis of bond portfolios and offer recommendations to clientele. He is a member of the firm's investment committee and provides invaluable insight in that capacity.

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Stephen Brophy

Over the last 34 years I have helped people who have been referred to me by friends and family. Our relationship started by working closely together to paint a picture of how they would like their future to look. As a result of this collaboration, we have become partners on the road to achieving their dreams.

I draw on my experiences as a tax accountant, an auditor of cities and municipalities, and a manager of corporate finance. I incorporate the knowledge I gained in obtaining my undergraduate degree in Accounting, and my Master of Science in Financial Planning. I have put an emphasis on continuing to learn and master my profession as evidenced by the designations I have studied hard for and earned.

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Bedford, New Hampshire

Daniel Campbell

Daniel Campbell is the founder of Perfected Wealth Management with a clear mission: to deliver exceptional wealth management services tailored to each client's needs. With a unique business model driven by advisor, client, and partner referrals, Daniel has cultivated a diverse clientele and attracted substantial investments. His expertise spans creating personalized investment portfolios, crafting retirement plans, forecasting cash flow, executing business succession strategies, and safeguarding assets. Daniel's professional trajectory in wealth management started at a boutique firm in Pasadena, CA, before he was recruited to Merrill Lynch, where he advised Bank of America's premier clientele. During his tenure, he earned the CERTIFIED FINANCIAL PLANNER™ designation, solidifying his expertise.

Perfected Wealth Management | daniel@perfectedwm.com
Irvine, California

Gwendolyn D. Chatham

I have been in the business many years and have seen the industry change drastically since my beginnings at E.F. Hutton. I decided to embrace a kinder, gentler life (both from a standpoint of lifestyle and taxes) and relocated from California to Nevada in 2018. We still maintain the California office, but I opened an office in Incline Village, Nevada that year as well. Our practice is unique from most in a number of ways. Our “team” consists of only three people, my partner, Alisa Sakowitz, and our assistant. We do not do any prospecting or marketing as our clients are strictly on a referral basis, principally from plaintiffs’ attorneys.

Park Avenue Securities | gchatham@pacificadvisors.com
Sacramento, California

Adam Ciepiela

Adam heads the wealth management practice at Charles Stephen, working with individuals and families to create the strategies and structures required for preserving and growing wealth. He also directs the firm’s business operations and relationships with third-party asset managers and other vendors.

Adam has a special interest in advising younger people to start planning early and takes every opportunity to speak to groups about financial wellness and security.

Charles Stephen | adam@charlesstephen.com
Albuquerque, New Mexico

Mark Colgan

Mark Colgan, CFP®, serves as the President of Montage Wealth Management, a firm dedicated to helping clients through some of life's most difficult transitions. With over 31 years of experience, Mark has worked closely with widows, guiding them through the challenging financial decisions that come after losing a partner. He understands how overwhelming and uncertain this time can feel, and his goal is to provide the clarity and support needed to move forward with confidence. Mark is also the author of *Death's Red Tape: Your Guide for Navigating Legal, Financial, and Personal Transitions When a Partner Dies*. Written with care and understanding, the book offers practical advice to help widows tackle the legal and financial tasks that often feel impossible in the wake of a loss. It's a trusted resource for bringing order and guidance during a time when everything else feels chaotic.

Montage Wealth Management | mcolgan@montagewm.com
Pittsford, New York

Leal Deddens

A seasoned wealth planning advisor with a passion for working with pre-retirees, retirees, and business owners, Leal specializes in helping you navigate the complex world of money. Leal is committed to managing your wealth, planning for your future, and helping solve problems during life's most difficult - and exciting moments.

Leal's mission is simple: to provide guidance throughout your wealth journey by assembling all the pieces of your financial puzzle together seamlessly so you can pursue a more prosperous future. Growing up with limited financial resources, Leal learned early on the value of careful planning and money management. This experience ignited his desire to help others organize and plan for life's needs, wants, and goals.

Integrated Financial Partners | leal.deddens@ifpadvisor.com
Fairfax, Virginia

Tom Dumas

After graduating from the University at Albany in 1993, Tom relocated to Charlotte from Upstate NY and joined Consolidated Planning in 2001 with the opportunity to build a career in financial services.

The scope of Tom's business is to build client relationships that provide opportunities for individuals and small business owners to achieve their financial goals. By meeting clients wherever they are on their current plan, Tom is able to provide guidance and strategies to improve efficiencies, increase cash flows, and design strategies around the clients long term vision.

As a student of this profession, Tom continues to build his knowledge and experience in the areas of accumulation, retirement, business exit and estate planning. He has earned the CERTIFIED FINANCIAL PLANNER® Professional, Chartered Financial Consultant® and Retirement Income Certified Professional® designations; holds Series 6,7,63 and 66 securities registrations; as well as Life and Health and Long Term Care insurance licenses.

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Charlotte, North Carolina

John Findley

I began my career in the Lincoln National Life Insurance Company home office in Fort Wayne, IN in 1989. I worked as a business analyst for our Retirement Plans Marketing Department. I was a managing conduit between our business manufacturing group for Retirement Plans Marketing and our Information Systems programming group. I moved to California to begin my Financial Planning Career in 1995 after a few years of consulting with our advisors throughout the nation.

As the son of a minister, I found this was the greatest opportunity for me to help large number of clients reach their financial goals. I joined our non-profit and hospital organization retirement planning group. This group was founded on strong principles for character and culture and had proven long term results including an amazing group of senior leaders. I was married and already had two young daughters when I moved to California. I had great confidence that the business I was joining would allow for hard work to be rewarded and supported by the local management. Later I was fortunate to have twin sons to round out the family.

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Scottsdale, Arizona

Martin understands that each client has their own unique financial needs, and he is devoted to fully understanding their current financial situation. Martin is committed to making certain that good information, sound advice and a choice of solutions are provided. This process allows a client and their family to make informed decisions and reach the solutions that are best for their unique needs. Once deciding upon a financial direction, Martin often works with the client's attorney and accountant in order to get a plan implemented. Providing this type of comprehensive planning has helped many clients get from where they were, to where they want to be, financially.

Martin Fong

Acord and Fong Wealth Strategies | martin.fong@acordandfong.com
San Ramon, California

I grew up in a small town in North East Iowa. My parents were both successful business owners. My father ran an insurance agency and my mother ran an antique and gift shop. It wasn't until 1989, during my senior year of high school, that I learned how quickly life can change. In February 1989, I was diagnosed with Lupus Nephritis, a disease of the autoimmune system. In the middle of basketball season and recruiting trips, my season ended. At 6' 4", my weight dropped to 126 pounds. The next seven months I spent in and out of hospitals. I was very fortunate to fully recover physically in late 1989 and have been healthy since then. The experience, however, will never be forgotten. It serves as a reminder to make sure I take care of those closest to me and live every day because you never know when life will deviate from your plan. The best you can do is to be prepared.

Marshall Gifford

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Minneapolis, Minnesota

John Girouard

John E. Girouard, CFP®, ChFC®, CLU®, CFS® is the president and CEO of Capital Asset Management Group and Capital Investment Advisors Inc., a SEC registered investment advisory firm. In his role as the principal of the firm, he provides comprehensive financial planning services and investment advisory services to individuals, entrepreneurs and executives in Washington D.C, Bethany Beach and Newport News locations.

John founded Capital Asset Management Group in 1981 after graduating college with a degree in economics and organizational communications. For over 36 years, his focus has been on removing the barriers that prohibit clients from making the necessary changes in their lives that will set them on a more confident path to financial success. As the founder of the Institute for Financial Independence, the learning center at Capital Asset Management Group, John focuses on educating his clients on the common pitfalls in the financial industry.

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Washington, DC

Debra Hilton

Debbie Hilton specializes in the design, implementation and management of employee benefit plans, Supplemental Executive Retirement Plans (SERPs) and benefit prefunding. A professional money manager since 1983, Hilton joined D. Hilton Associates in 1996 after successfully selling her money management practice. While working with credit unions in the recruitment and retention of senior executives, she recognized the important relationship between total compensation, SERP design, and investment performance as an integral retention tool.

As an Independent Registered Representative with LPL Financial, Hilton established D. Hilton Financial Services in 1999 for the express purpose of facilitating the implementation and ongoing oversight of executive retirement plans. She has been instrumental in the implementation of more than $1 billion in retention, retirement and compensation plans for credit union executives. The firm has consulted with more than 900 credit union clients nationwide in the development of SERP solutions.

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The Woodlands, Texas

Brian Kidwell

Brian Kidwell, SPHR, Executive Vice President, specializes in executive succession planning, SERP design, executive recruiting analytics, compensation and benefits analysis, qualitative and quantitative research, site selection analysis, organizational assessment, and strategic planning.

Kidwell is responsible for the development of D. Hilton's Member Migration Model – an exclusive research tool used for customer segmentation, behavior analysis, and lifetime value. Before joining D. Hilton, Kidwell worked as a consultant focusing on consumer behavior business strategy.

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The Woodlands, Texas

Curt Knotick

Curt is Owner and CEO of Accurate Solutions Group and an Investment Adviser Representative of ASG Investment Management, LLC. He has been in the insurance and annuity industry since 1989 and holds his Series 65 license. You can hear him on Word FM or WJAS Saturday mornings, where he hosts radio show, "Your Retirement Blueprint". Curt's years of experience working with clients have given him the knowledge and ability to assist with income, tax, wealth, and estate planning.

ASG Investment Mgmt., LLC | curt@asgretire.com
Renfrew, Pennsylvania

James Lingelbach

Jim has been in the Financial Services industry since 1987. During that time he has earned 5 designations, CFP®, ChFC, CLU, CASL and RICP. He Founded CURO Financial Planning, LLC in 2015 with his business partner Ciano Villaquiran. Jim's specialty is assisting clients through the retirement transition. The greatest professional satisfaction Jim feels is not in the getting, but in the giving and helping—and in the relationships he forms with clients. This is what drives him to continually improve his practice and be the best he can be, every day, for every client.

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San Diego, California

Mike McGuire

Michael has been an advisor for 25 years. As president of Atlas Advisors, He has overseen the growth of the Firm to over $1 Billion in AUM. Recently He has formed a new entity focused on helping retiring advisors transition their life's work to a safe place where their legacy will be preserved and valued.

Atlas Advisors | mmcguire@atlasadvisorgroup.com
Bethlehem, Pennsylvania

Since joining TPG in 1997, KC has shared his expertise with families in areas he understands well: protection, savings, and growth. KC is recognized by his peers as a leader and by his clients as a thought leader. As an Oregon State graduate, his loyalties are now split between OSU and the University of Texas, where his youngest attends school and KC currently calls home. When not in the office, he enjoys being with his family, working on creating a real estate portfolio, and playing golf.

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Portland, Oregon

K.C. Mink

David L. Mire is a Managing Executive, Financial Advisor and Registered Financial Consultant and President/Owner of The ROCK Financial Group. His mission is to help people build wealth with integrity and to gain financial peace!

David has nearly 40 years as a Financial Advisor. After a few years with another brokerage firm, he joined the brokerage firm of Advisor Group (now OSAIC, Inc.), and for more than 35 years, he offers securities, i.e., stocks, mutual funds, bonds and fee-based financial planning through them. OSAIC Wealth, Inc. is an American wealth management firm serving approximately 11,000 financial professionals and managing more than $515 billion in assets.

David Mire

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Lafayette, Louisiana

Marek Pfeil

Marek has worked in the financial services industry for over 15 years. Prior to co-founding Harmony Point Wealth Advisors, he worked at several national registered investment advisory firms catering to institutional clients. He has extensive experience in researching investment strategies and helping clients design portfolios to reach their financial goals.

Marek holds an undergraduate degree in Finance from Virginia Polytechnic Institute and State University (Virginia Tech) where he graduated summa cum laude and was a four-year letterman on the men's tennis team. He has an MBA with a concentration in Finance/Investments from the University of Notre Dame Mendoza College of Business. Marek has earned the right to hold the Chartered Financial Analyst (CFA) designation and also holds the FINRA Series 7 and 66 security licenses.

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Irvine, California

Chris Robertson

Chris Robertson joined Peak Financial Group in 2019. He specializes in comprehensive financial planning, estate planning strategies, wealth management, and business owner planning.

Chris graduated from UCLA with a Bachelor of Science in Aerospace Engineering. After working with Boeing for two years, he decided to pursue a more active and challenging career in financial services, joining the Peak Financial Group team. Chris holds FINRA Series 7 and 66 registrations and is licensed in Life Insurance in several states.

Chris is an Eagle Scout, involved in Boy Scouts of America, and the Surfrider Foundation. He enjoys outdoor activities, including mountain treks up Mount Kilimanjaro and Aconcagua, as well as water polo, swimming, snowboarding, and traveling with family and friends.

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Sharla Rountree

Sharla D. Rountree is the owner of Personal Benefit Financial, which she joined in 1988. Due to increased public awareness and consumer demand to be more knowledgeable about investments, retirement concerns and insurance options, Ms. Rountree has taught adult education through a community college on financial planning and investing, as well as, provided federal government retirement seminars with Personal Benefit Services Seminar since 1990. Ms. Rountree has contributed to the “Money Wise” column for the Rocky Mountain News, a Bi-monthly Economic update and publishes a bi-monthly financial planning newsletter, The Dollar Chase. In addition, she works as a corporate and non-profit retirement plan advisor.

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Lakewood, Colorado

Katie Tam

Katie is Gifford Financial’s Investment Specialist. She collaborates with clients as they initiate new accounts and make changes to current investments. Katie works closely with the investment companies, fostering those relationships to better be able to assist in how our clients interact through the various stages of account opening and finalization. She places trades and welcomes any investment, service, and general questions you may have. Katie is a Registered Administrative Assistant with Cetera Advisor Networks LLC, Member FINRA/SIPC.

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Minneapolis, Minnesota

Deborah Tiell

Over 25 years ago, my career as a financial advisor was written in the stars. From humble beginnings working out of the trunk of my car, and going door to door for business, I opened a physical office in 2004 in Bascom, Ohio. The company has grown vastly since then, as we currently employ 11 associates and service clients in over 20 states. I specialize in 401(k) rollovers, efficient tax planning and retirement strategizing. I received education from Tiffin University and currently hold Series 6, 63, 65 and 26 registrations.

Over the years, I have been involved in several of the top financial continuing education programs, such as, Learning Institute for Tax Efficiency, and a qualifying member of the Million Dollar Round Table, which is a Premier Association of Financial Professionals.

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Bascom, Ohio

Kit Tiell

I received a Bachelors in Business from Tiffin University in 2008 and an MBA from Webster University in London in 2010. I started my career as a tax advisor working for both Deloitte and EY preparing US and UK tax returns for ultra-high net worth individuals. In 2016, I returned home to join Tiell Financial Group as part of the succession planning as my aunt, the founder, prepared for her own retirement. My role at Tiell Financial Group continues to evolve depending on client needs and industry trends. My job allows me to help friends, family, and neighbors save for the future, retire with confidence, and transition through stages of life.

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Bascom, Ohio

Kenneth Williams

Ken has been in the financial services industry since 1977. In addition to his professional affiliations, he has served as a speaker and panelist on various forums in continuing education programs on investments, estate planning, and insurance-related topics. Ken grew up on the East Coast and has been married to his wife Cindy since 1973. They have eight children and seventeen grandchildren. Kens spends his free time attending his grandchildren's activities, coaching, taking walks with his wife, and playing golf and tennis. He serves as President of the Marbella Scholarship Foundation at Marbella Country Club.

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Shawn Wilson

Drawing on nearly two decades of experience, Shawn serves as a dedicated wealth planning advisor to high-net-worth individuals at or near retirement, corporate executives, and entrepreneurs. Specializing in thoughtfully tailored financial plans, Shawn will ensure every strategy is designed to support your biggest goals and greatest aspirations.

Shawn's mission is simple: to help individuals and families successfully retire, and stay retired, according to their vision and as early in life as they choose.

Shawn takes pride in making personal connections and begins by listening to stories about your family dynamics, goals, and values to grasp the very essence of who you are. With the soul of a teacher and the heart of a listener, Shawn places an emphasis on education so you can feel empowered to make better financial decisions. He enjoys making the complex simple and translating sophisticated financial topics into terms that are easy to understand.

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