

The four fields in each employee card below represent: Job Title, City, Department, and Location (think branch or office unit).

The Location dropdown on lefthand side sorts by branch or office name, not city. To see ALL employees located in a city, use the search bar that is directly below the alphabet buttons.

SEE ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Q

▼ Locations

▼ Departments

Upchurch, Brandon

Senior Consultant

Indianapolis

Relationship Management

INDKeystone

Upchurch, Brian

Managing Principal

Indianapolis

N/A

INDKeystone

Upole, Gregory

Client Management Consultant

Uniontown

Wealth Client Service

Green

Urban, Dan

Senior Vice President

Warren

Financial Advisor

WARIndependence

Vaassen, Terri

Senior Client Management Consultant

West Des Moines

Institutional Client Service

West Des Moines

Valk, William

Senior Associate

Lake Success

Financial Planning

Lake Success

Valmonte, James

Vice President

Riverside

Financial Advisor

Riverside

Valone, Mike

Financial Advisor

Tampa

N/A

Tampa

Van Buskirk, Kevin

Manager

Chicago

Investment Research

CHIWMonroe-Chicago

Van Der Leeuw, Graham

Operations

Minnetonka

N/A

MINRedcircle

Van Guilder, Daniel

Senior Client Management Consultant

Minneapolis

Institutional Client Service

Minneapolis

Van Horn, Haley

Associate

Raleigh

Defined Contribution

Raleigh

Vance, Brent

Senior Client Management Consultant

Tampa

Institutional Client Service

Tampa

Vandegriff, J.T.

Principal

Phoenix

Financial Advisor

PHXCamelback

Vander Ploeg, Peter

Vice President

Lone Tree

Financial Advisor

Colorado Lone Tree

Vasilic, Jess

Senior Associate

Phoenix

Relationship Manager

N/A

Vaughan, Carter

Financial Advisor

Fort Worth

Relationship Manager

FTWThrockmorton

Veach, Casey

Vice President

Southfield

Financial Advisor

MITown

Verhaeghe, Grant

Senior Director

Raleigh

Asset/Liability Practice Leader

Raleigh

Vermillion, Seth

Senior Manager

Tampa

Investment Research

Tampa

<div>VerSchure, Timothy</div> <div> <div>Principal</div> <div>Chesterton</div> <div>Financial Advisor</div> <div>Chesterton</div> </div>	<div>Vert, Laura</div> <div> <div>Senior Associate</div> <div>Clarkston</div> <div>Finance</div> <div>Michigan</div> </div>	<div>Vest, Brian</div> <div> <div>Manager II</div> <div>Warren</div> <div>Investment Group</div> <div>WARIndependence</div> </div>	<div>Villapudua, Briana</div> <div> <div>Administrative Associate</div> <div>Sacramento</div> <div>Administrative Professionals</div> <div>SACUniversity-Sacramento</div> </div>
<div>Vogelzang, Katherine</div> <div> <div>Intern</div> <div>Raleigh</div> <div>Marketing</div> <div>Raleigh</div> </div>	<div>Vogelzang, Mike</div> <div> <div>Managing Director</div> <div>Boston</div> <div>Chief Investment Officer</div> <div>Boston</div> </div>	<div>Vojka, Shqiprona</div> <div> <div>Consultant</div> <div>Phoenix</div> <div>Human Resources</div> <div>PHXCamelback</div> </div>	<div>Volkman, Will</div> <div> <div>Senior Specialist</div> <div>Charlotte</div> <div>Investment Research</div> <div>Charlotte</div> </div>
<div>Volo, Mike</div> <div> <div>Principal</div> <div>Boston</div> <div>Financial Advisor</div> <div>NYCWall</div> </div>	<div>Vos, Timothy J.</div> <div> <div>Principal</div> <div>Houston</div> <div>N/A</div> <div>HOUMcKinney</div> </div>	<div>Vredenburg, Ona</div> <div> <div>Senior Associate</div> <div>Boston</div> <div>Relationship Management</div> <div>Boston</div> </div>	<div>Wadsworth, Hannah</div> <div> <div>Senior Analyst</div> <div>Montgomery</div> <div>Advisor Group</div> <div>Montgomery AL</div> </div>
<div>Wahlen, David</div> <div> <div>Manager</div> <div>Raleigh</div> <div>Recruiting & Acquisitions</div> <div>Raleigh</div> </div>	<div>Wahlers, Ryan</div> <div> <div>Intern</div> <div>Raleigh</div> <div>Wealth Planning</div> <div>N/A</div> </div>	<div>Wahlin, Cori</div> <div> <div>Client Management Consultant</div> <div>Salt Lake City</div> <div>Wealth Client Service</div> <div>Salt Lake City</div> </div>	<div>Walding, Nick</div> <div> <div>Senior Analyst</div> <div>Chesterton</div> <div>Investment Research</div> <div>Chesterton</div> </div>
<div>Walker, Tiffany</div> <div> <div>Financial Advisor</div> <div>Minneapolis</div> <div>N/A</div> <div>Minneapolis</div> </div>	<div>Wall, Jonathan</div> <div> <div>Intern</div> <div>Raleigh</div> <div>Advice & Wellness</div> <div>Raleigh</div> </div>	<div>Wallace, David</div> <div> <div>Senior Vice President</div> <div>San Antonio</div> <div>Financial Advisor</div> <div>SATNLoop-San Antonio</div> </div>	<div>Wallace, Kathleen</div> <div> <div>Principal</div> <div>Boston</div> <div>Family Office</div> <div>Boston</div> </div>
<div>Walsh, Lauren</div> <div> <div>Administrative Associate</div> <div>Wilmington</div> <div>Administrative Professionals</div> </div>	<div>Walters, Cheryl</div> <div> <div>Manager</div> <div>Tampa</div> <div>Institutional Client Service</div> </div>	<div>Ward, Aaron</div> <div> <div>Principal</div> <div>Southfield</div> <div>N/A</div> </div>	<div>Ward, Morgan</div> <div> <div>Senior Specialist</div> <div>Tampa</div> <div>Performance Reporting</div> </div>

<div> <div>N/A</div> <div></div> </div>	<div> <div>Tampa</div> <div></div> </div>	<div> <div>Southfield</div> <div></div> </div>	<div> <div>Tampa</div> <div></div> </div>
<div>Ware, Patterson</div> <div> <div>Associate</div> <div>Brentwood</div> <div>Relationship Management</div> <div>NASHMaryland</div> </div>	<div>Warnock, Paige</div> <div> <div>Associate</div> <div>Raleigh</div> <div>Asset/Liability</div> <div>Raleigh</div> </div>	<div>Warren, Colby</div> <div> <div>Manager II</div> <div>Raleigh</div> <div>Marketing</div> <div>Raleigh</div> </div>	<div>Warren, Levi</div> <div> <div>Client Management Associate II</div> <div>Raleigh</div> <div>Institutional Client Service</div> <div>Raleigh</div> </div>
<div>Warrick, Carolin</div> <div> <div>Senior Specialist</div> <div>Montgomery</div> <div>Performance Reporting</div> <div>Montgomery AL</div> </div>	<div>Warwick, Bob</div> <div> <div>Financial Advisor</div> <div>Wilmington</div> <div>Client Solutions Group</div> <div>Wilmington NC</div> </div>	<div>Waterbury, Rod</div> <div> <div>Principal</div> <div>Roseville</div> <div>Financial Advisor</div> <div>SACUniversity-Roseville</div> </div>	<div>Waters, Kathy</div> <div> <div>Senior Financial Advisor</div> <div>Lake Success</div> <div>N/A</div> <div>Lake Success</div> </div>
<div>Watkins, Trey</div> <div> <div>Associate</div> <div>Raleigh</div> <div>Centralized Trading</div> <div>N/A</div> </div>	<div>Watowicz, Barbara</div> <div> <div>Executive Assistant</div> <div>Raleigh</div> <div>Administrative Professionals</div> <div>Raleigh</div> </div>	<div>Weaver, Pam</div> <div> <div>Senior Associate</div> <div>Clarkston</div> <div>Finance</div> <div>Michigan</div> </div>	<div>Weaver, Theresa</div> <div> <div>Senior Client Management Consultant</div> <div>Kansas City</div> <div>Wealth Client Service</div> <div>KANMain-Kansas City</div> </div>
<div>Webb, Katrina</div> <div> <div>Senior Manager</div> <div>Raleigh</div> <div>Institutional Client Service</div> <div>Raleigh</div> </div>	<div>Webb, Mike</div> <div> <div>Senior Manager</div> <div>New York</div> <div>Plan Consulting</div> <div>NYCWall</div> </div>	<div>Webel, Nathan</div> <div> <div>Senior Associate</div> <div>Uniontown</div> <div>Financial Planning</div> <div>Green</div> </div>	<div>Weber, John</div> <div> <div>Vice President</div> <div>Columbia</div> <div>Financial Advisor</div> <div>Missouri</div> </div>
<div>Weger, Joe</div> <div> <div>Manager II</div> <div>Raleigh</div> <div>Vendor Analysis Client Solutions</div> <div>Raleigh</div> </div>	<div>Weidner, Nick</div> <div> <div>Client Management Consultant</div> <div>Minneapolis</div> <div>Wealth Client Service</div> <div>Minneapolis</div> </div>	<div>Weigand, Laura</div> <div> <div>Senior Administrative Associate</div> <div>Tampa</div> <div>Administrative Professionals</div> <div>Tampa</div> </div>	<div>Weisenbacher, Kelley</div> <div> <div>Client Management Consultant</div> <div>Chesterton</div> <div>Institutional Client Service</div> <div>Chesterton</div> </div>
<div>Weisz, Allen</div> <div> <div>Senior Financial Advisor</div> </div>	<div>Welch, Christian</div> <div> <div>Intern</div> </div>	<div>Welch, Jr., Edward</div> <div> <div>Managing Director</div> </div>	<div>Weng, Riley</div> <div> <div>Associate</div> </div>

<div> <div>🏠</div> <div>Minneapolis</div> </div> <div> <div>🔗</div> <div>Relationship Manager</div> </div> <div> <div>🏠</div> <div>Minneapolis</div> </div> <div>></div>	<div> <div>🏠</div> <div>Raleigh</div> </div> <div> <div>🔗</div> <div>Finance</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div>></div>	<div> <div>🏠</div> <div>Montgomery</div> </div> <div> <div>🔗</div> <div>Head of Wealth Management</div> </div> <div> <div>🏠</div> <div>Montgomery AL</div> </div> <div>></div>	<div> <div>🏠</div> <div>New York</div> </div> <div> <div>🔗</div> <div>Tax</div> </div> <div> <div>🏠</div> <div>NYCWall</div> </div> <div>></div>
<div>Wenzel, Sharon</div> <div> <div>🏠</div> <div>Lead Technology Support</div> </div> <div> <div>🏠</div> <div>Clarkston</div> </div> <div> <div>🔗</div> <div>IT Infrastructure</div> </div> <div> <div>🏠</div> <div>Michigan</div> </div> <div>></div>	<div>Werner, Jody</div> <div> <div>🏠</div> <div>Senior Client Management Consultant</div> </div> <div> <div>🏠</div> <div>Greensburg</div> </div> <div> <div>🔗</div> <div>Wealth Client Service</div> </div> <div> <div>🏠</div> <div>PITOford</div> </div> <div>></div>	<div>Werner, Marcie</div> <div> <div>🏠</div> <div>Client Management Consultant</div> </div> <div> <div>🏠</div> <div>Greensburg</div> </div> <div> <div>🔗</div> <div>Wealth Client Service</div> </div> <div> <div>🏠</div> <div>PITOford</div> </div> <div>></div>	<div>Wertheim, Jennifer</div> <div> <div>🏠</div> <div>Director</div> </div> <div> <div>🏠</div> <div>Phoenix</div> </div> <div> <div>🔗</div> <div>Tax</div> </div> <div> <div>🏠</div> <div>PHXCamelback</div> </div> <div>></div>
<div>Wertheim, Scott</div> <div> <div>🏠</div> <div>Principal</div> </div> <div> <div>🏠</div> <div>Doylestown</div> </div> <div> <div>🔗</div> <div>Financial Advisor</div> </div> <div> <div>🏠</div> <div>Doylestown</div> </div> <div>></div>	<div>West, Alex</div> <div> <div>🏠</div> <div>Senior Client Management Consultant</div> </div> <div> <div>🏠</div> <div>Charlotte</div> </div> <div> <div>🔗</div> <div>Institutional Client Service</div> </div> <div> <div>🏠</div> <div>Charlotte</div> </div> <div>></div>	<div>West, Samantha</div> <div> <div>🏠</div> <div>Administrative Associate</div> </div> <div> <div>🏠</div> <div>Chicago</div> </div> <div> <div>🔗</div> <div>Administrative Professionals</div> </div> <div> <div>🏠</div> <div>CHIWMonroe-Chicago</div> </div> <div>></div>	<div>Westin, Dan</div> <div> <div>🏠</div> <div>Managing Principal</div> </div> <div> <div>🏠</div> <div>Minnetonka</div> </div> <div> <div>🔗</div> <div>N/A</div> </div> <div> <div>🏠</div> <div>MINRedcircle</div> </div> <div>></div>
<div>Westra, David</div> <div> <div>🏠</div> <div>Principal</div> </div> <div> <div>🏠</div> <div>Phoenix</div> </div> <div> <div>🔗</div> <div>Financial Advisor</div> </div> <div> <div>🏠</div> <div>PHXCamelback</div> </div> <div>></div>	<div>Wheat, Audrey</div> <div> <div>🏠</div> <div>Manager II</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div> <div>🔗</div> <div>Vendor Analysis Strategic Relations</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div>></div>	<div>White, Julie</div> <div> <div>🏠</div> <div>Senior Client Management Consultant</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div> <div>🔗</div> <div>Institutional Client Service</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div>></div>	<div>White, Mary</div> <div> <div>🏠</div> <div>Associate</div> </div> <div> <div>🏠</div> <div>Wayzata</div> </div> <div> <div>🔗</div> <div>Tax Operations</div> </div> <div> <div>🏠</div> <div>PHXCamelback-Wayzata</div> </div> <div>></div>
<div>White, Ray</div> <div> <div>🏠</div> <div>Senior Associate Patching Engineer</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div> <div>🔗</div> <div>IT Infrastructure</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div>></div>	<div>Whitlow, Christopher</div> <div> <div>🏠</div> <div>Senior Director</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div> <div>🔗</div> <div>Advice & Wellness</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div>></div>	<div>Whitmore, Kathleen</div> <div> <div>🏠</div> <div>Account Manager</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div> <div>🔗</div> <div>Advice & Wellness</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div>></div>	<div>Whitmore, Peggy</div> <div> <div>🏠</div> <div>Vice President</div> </div> <div> <div>🏠</div> <div>Lake Success</div> </div> <div> <div>🔗</div> <div>Financial Advisor</div> </div> <div> <div>🏠</div> <div>Lake Success</div> </div> <div>></div>
<div>Whitt, Meagan</div> <div> <div>🏠</div> <div>Client Management Consultant</div> </div> <div> <div>🏠</div> <div>Homewood</div> </div> <div> <div>🔗</div> <div>Wealth Client Service</div> </div> <div> <div>🏠</div> <div>Birmingham AL</div> </div> <div>></div>	<div>Whitten, Travis</div> <div> <div>🏠</div> <div>Senior Vice President</div> </div> <div> <div>🏠</div> <div>Dallas</div> </div> <div> <div>🔗</div> <div>Financial Advisor</div> </div> <div> <div>🏠</div> <div>Dallas</div> </div> <div>></div>	<div>Wicker, Derrick</div> <div> <div>🏠</div> <div>Team Lead Technology Support</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div> <div>🔗</div> <div>IT Infrastructure</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div>></div>	<div>Wickham, Cheryl</div> <div> <div>🏠</div> <div>Analyst</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div> <div>🔗</div> <div>Compliance</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div>></div>
<div>Wildman, William</div>	<div>Will, David A.</div>	<div>Willard, Thomas</div>	<div>Willett, Susan</div>

<div>Associate Hardware & Integration</div> <div>Raleigh</div> <div>IT Infrastructure</div> <div>Raleigh</div> <div></div>	<div>Senior Financial Advisor</div> <div>Allentown</div> <div>N/A</div> <div>Allentown</div> <div></div>	<div>Senior Client Management Consultant</div> <div>Boston</div> <div>Wealth Client Service</div> <div>BOSFederal</div> <div></div>	<div>Vice President</div> <div>Wilmington</div> <div>Financial Advisor</div> <div>WILMlrongate</div> <div></div>
<div>Williams, Beau</div> <div>Senior Financial Advisor</div> <div>Homewood</div> <div>Portfolio Management</div> <div>Birmingham AL</div> <div></div>	<div>Williams, Kathy</div> <div>Client Management Consultant</div> <div>Homewood</div> <div>Institutional Client Service</div> <div>Birmingham AL</div> <div></div>	<div>Williamson, Judy</div> <div>Senior Retirement Counselor</div> <div>Raleigh</div> <div>Advice & Wellness</div> <div>Raleigh</div> <div></div>	<div>Williamson, Wendy</div> <div>Senior Team Leader</div> <div>Raleigh</div> <div>Wealth Client Service</div> <div>Raleigh</div> <div></div>
<div>Willingham, Robin</div> <div>Operations</div> <div>Homewood</div> <div>N/A</div> <div>HOUMcKinney</div> <div></div>	<div>Willis, Lori</div> <div>Client Management</div> <div>Indianapolis</div> <div>N/A</div> <div>INDKeystone</div> <div></div>	<div>Willman, Jeffery</div> <div>Senior Team Leader</div> <div>Raleigh</div> <div>Institutional Operations</div> <div>Raleigh</div> <div></div>	<div>Willoughby, Veronica</div> <div>Director</div> <div>Raleigh</div> <div>Administrative Professionals</div> <div>Raleigh</div> <div></div>

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