

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

Gonzalez, Jackie

Client Coordinator

San Antonio

Administrative Professionals

SATNLoop-San Antonio

Goodman, Maureen

Senior Associate

Indianapolis

Relationship Management

INDKeystone

Goodman, Max

Associate II

San Antonio

Investment Research

South Texas-San Antonio

Gordon, Scott

Principal

Folsom

Financial Advisor

SACIronPoint

Gorney, Karren

Senior Client Management Consultant

Raleigh

Institutional Client Service

Raleigh

Gorokhova, Irina

Operations

Houston

N/A

HOUMcKinney

Gostkowski, Lisa

Senior Vice President

San Antonio

Financial Advisor

South Texas-San Antonio

Grace, Sheridan

Financial Advisor

New Orleans

Relationship Manager

NOLAPoydras

Grady, Myles

Associate II

Raleigh

Finance

Raleigh

Graham, Bruce

Vice President

Greenwich

Financial Advisor

Greenwich

Graham, Emma

Associate II

Raleigh

Human Resources

Raleigh

Graham, Jeb

Principal

Tampa

Financial Advisor

Tampa

Gray, Mike

Principal

Raleigh

Financial Advisor

Raleigh

Gray, Roth

Associate II

Raleigh

Marketing

Raleigh

Graziano, Matt

Client Management Consultant

New York

Institutional Client Service

NYCWall

Graziosi, Antonio

Senior Client Management Associate

Lake Success

Wealth Client Service

Lake Success

Greehey, William

Associate II

San Antonio

Investment Research

South Texas-San Antonio

Green, Kareem

Associate

Bethlehem

Financial Planning

Bethlehem Downtown

Green, Kayla

Client Relationship Manager

Raleigh

Institutional Client Service

Raleigh

Greenbaum, Laura

























































































Financial Advisor

Kansas City

Relationship Manager

KANMain

<p>Greenberg, Elliot</p> <ul style="list-style-type: none"> Principal Chicago N/A CHIWMonroe-Chicago 	<p>Greenfield, Blake</p> <ul style="list-style-type: none"> Operations Kansas City N/A KANMain 	<p>Gresack, Dan</p> <ul style="list-style-type: none"> Client Management Consultant Warren Institutional Client Service WARIndependence 	<p>Grethen, Madeline</p> <ul style="list-style-type: none"> Senior Client Management Associate Dallas Wealth Client Service SATNLoop-Dallas
<p>Griffeth, Chad</p> <ul style="list-style-type: none"> Vice President Minneapolis Financial Advisor Minneapolis 	<p>Griffith, John</p> <ul style="list-style-type: none"> Principal Tampa Financial Advisor Tampa 	<p>Griggs-Murray, Kim</p> <ul style="list-style-type: none"> Senior Client Management Consultant Charlotte Institutional Client Service Charlotte 	<p>Griswold, Dickson</p> <ul style="list-style-type: none"> Senior Vice President Glendale Financial Advisor KANMain
<p>Grout, Kyle</p> <ul style="list-style-type: none"> Intern Phoenix Wealth Management N/A 	<p>Grubb, Teri</p> <ul style="list-style-type: none"> Senior Director San Antonio Advisor Group N/A 	<p>Gryp, Sarah</p> <ul style="list-style-type: none"> Manager Phoenix Tax PHXCamelback 	<p>Guadiano, Diana</p> <ul style="list-style-type: none"> Manager San Antonio Tax N/A
<p>Guerra, Lyda</p> <ul style="list-style-type: none"> Client Management Consultant San Antonio Wealth Client Service SATNLoop-San Antonio 	<p>Guerra, Velma</p> <ul style="list-style-type: none"> Manager San Antonio Tax SATNLoop-San Antonio 	<p>Guo, May</p> <ul style="list-style-type: none"> Intern Raleigh Wealth Planning Raleigh 	<p>Gupte, Eshani</p> <ul style="list-style-type: none"> Senior Analyst San Antonio Investment Research South Texas-San Antonio
<p>Guthrie, Jacquelyn</p> <ul style="list-style-type: none"> Senior Specialist Raleigh Integration Raleigh 	<p>Hadley, Lori</p> <ul style="list-style-type: none"> Senior Client Management Consultant Wichita Wealth Client Service KANMain 	<p>Haefner, Lauren</p> <ul style="list-style-type: none"> Client Management Consultant Phoenix Wealth Client Service PHXCamelback 	<p>Hagopian, Narine</p> <ul style="list-style-type: none"> Manager Boston Tax Boston
<p>Hahlen, Glen</p> <ul style="list-style-type: none"> Senior Vice President Uniontown Financial Advisor 	<p>Haire, Joshua S.</p> <ul style="list-style-type: none"> Senior Vice President West Chester Financial Advisor 	<p>Halasz, Teri</p> <ul style="list-style-type: none"> Senior Client Management Consultant Dayton Wealth Client Service 	<p>Halata, Christy</p> <ul style="list-style-type: none"> Client Management Houston Institutional Client Service

 Green >	 Cincinnati >	 Dayton >	 HOUMcKinney >
<div>Halk, John</div> <div>  Account Manager </div> <div>  Raleigh </div> <div>  Advice & Wellness </div> <div>  Raleigh > </div>	<div>Hall, Carter</div> <div>  Principal </div> <div>  Greenville </div> <div>  N/A </div> <div>  GNVMain > </div>	<div>Hall, Jay</div> <div>  Client Management Consultant </div> <div>  Charlotte </div> <div>  Institutional Client Service </div> <div>  Charlotte > </div>	<div>Hall, Kim</div> <div>  Client Management </div> <div>  Indianapolis </div> <div>  N/A </div> <div>  INDKeystone > </div>
<div>Hall, Shelley</div> <div>  Client Management </div> <div>  Minnetonka </div> <div>  Wealth Client Service </div> <div>  MINRedcircle > </div>	<div>Hamann, Jeremy</div> <div>  Intern </div> <div>  Raleigh </div> <div>  Centralized Trading </div> <div>  Raleigh > </div>	<div>Hamilton, Lisa</div> <div>  Client Management Consultant </div> <div>  Folsom </div> <div>  Wealth Client Service </div> <div>  SACIronPoint > </div>	<div>Hancock, Zach</div> <div>  Senior Associate </div> <div>  Raleigh </div> <div>  Wealth Investments </div> <div>  Raleigh > </div>
<div>Hand, Matt</div> <div>  Senior Associate </div> <div>  Stockbridge </div> <div>  Financial Planning </div> <div>  N/A > </div>	<div>Hansen, David</div> <div>  Principal </div> <div>  Lexington </div> <div>  Financial Advisor </div> <div>  Lynchburg > </div>	<div>Hansen, Tracy</div> <div>  Associate </div> <div>  Phoenix </div> <div>  Tax Operations </div> <div>  PHXCamelback > </div>	<div>Hanson, Jeremy</div> <div>  Senior Manager </div> <div>  Charlotte </div> <div>  Client Service </div> <div>  Charlotte > </div>
<div>Hanson, Kathy</div> <div>  Client Management Consultant </div> <div>  San Ramon </div> <div>  Wealth Client Service </div> <div>  San Ramon > </div>	<div>Hardgrove, Tom</div> <div>  Principal </div> <div>  Fort Worth </div> <div>  N/A </div> <div>  FTWThrockmorton > </div>	<div>Hardie, Nick</div> <div>  Associate </div> <div>  Raleigh </div> <div>  Asset/Liability </div> <div>  Raleigh > </div>	<div>Hardin, Chad</div> <div>  Senior Associate </div> <div>  Raleigh </div> <div>  Asset/Liability </div> <div>  Raleigh > </div>
<div>Hardin, Haley</div> <div>  Client Management </div> <div>  Brentwood </div> <div>  Wealth Client Service </div> <div>  NASHMaryland > </div>	<div>Hardin, Jared</div> <div>  Financial Advisor </div> <div>  New York </div> <div>  N/A </div> <div>  NYCWall > </div>	<div>Hargrove, Kevin</div> <div>  Senior Associate </div> <div>  Raleigh </div> <div>  Marketing </div> <div>  Raleigh > </div>	<div>Hargrove, Michael</div> <div>  Senior Client Management Consultant </div> <div>  Raleigh </div> <div>  Wealth Client Service </div> <div>  Raleigh > </div>
<div>Harmon, Spencer</div> <div>  Specialist </div>	<div>Harpe, Micheal</div> <div>  Senior Client Management Associate </div>	<div>Harrell, Natalie</div> <div>  Client Management Associate II </div>	<div>Harris, Skyler</div> <div>  Senior Associate </div>

<ul style="list-style-type: none"> Salt Lake City Advice & Wellness Salt Lake City 	<ul style="list-style-type: none"> Greenwood Village Institutional Client Service CHIWMonroe-Greenwood Village 	<ul style="list-style-type: none"> Raleigh Institutional Client Service Raleigh 	<ul style="list-style-type: none"> Phoenix Wealth Operations PHXCamelback
<p>Harris, Susan</p> <ul style="list-style-type: none"> Senior Associate Brentwood Relationship Management NASHMaryland 	<p>Harris, Tim</p> <ul style="list-style-type: none"> Associate II Raleigh Nonqualified Executive Benefits N/A 	<p>Harscher, Susannah</p> <ul style="list-style-type: none"> Manager Kansas City Wealth Client Service KANMain-Kansas City 	<p>Harsh, Daniel</p> <ul style="list-style-type: none"> Financial Advisor Uniontown Financial Planning Green
<p>Hartman, Brent J.</p> <ul style="list-style-type: none"> Investment Strategist Salt Lake City N/A Salt Lake City 	<p>Hartman, Clay</p> <ul style="list-style-type: none"> Senior Vice President Kansas City Financial Advisor KANMain 	<p>Hartness, David</p> <ul style="list-style-type: none"> Principal Wilmington Financial Advisor WILMlrngate 	<p>Hartsoe, Laura</p> <ul style="list-style-type: none"> Client Management Consultant Charlotte Institutional Client Service Charlotte
<p>Harvey, Donte</p> <ul style="list-style-type: none"> Associate II Raleigh Performance Reporting Raleigh 	<p>Harvey, Scott</p> <ul style="list-style-type: none"> Client Management Specialist Raleigh Institutional Client Service Raleigh 	<p>Harvey, Sheila</p> <ul style="list-style-type: none"> Senior Client Management Consultant Chesterton Wealth Client Service Chesterton 	<p>Hassan, Ziad</p> <ul style="list-style-type: none"> Client Management Consultant Tampa Wealth Client Service Tampa
<p>Hau, Errol</p> <ul style="list-style-type: none"> Principal Southfield Financial Advisor Michigan 	<p>Hausmann, Jeri</p> <ul style="list-style-type: none"> Administrative Associate Minneapolis Administrative Professionals Minneapolis 	<p>Havel, Aaron</p> <ul style="list-style-type: none"> Client Management Associate II San Ramon Wealth Client Service San Ramon 	<p>Hawk, Kellie</p> <ul style="list-style-type: none"> Senior Associate Greenwood Village Performance Reporting CHIWMonroe-Greenwood Village
<p>Hay, Lisa</p> <ul style="list-style-type: none"> Financial Advisor Uniontown N/A Green 	<p>Haynes, Oliver</p> <ul style="list-style-type: none"> Principal Montgomery Financial Advisor Montgomery AL 	<p>Haynes, Sarah</p> <ul style="list-style-type: none"> Senior Consultant Wilmington Relationship Management WILMlrngate 	<p>Hays, John</p> <ul style="list-style-type: none"> Manager II Raleigh Defined Contribution Raleigh
<p>Healy, Amy Jo</p>	<p>Heasley, Jeffrey</p>	<p>Heath, Ronald</p>	<p>Heath, Ryan</p>

<div><div></div>Associate</div> <div><div></div>Raleigh</div> <div><div></div>Tax</div> <div><div></div>PHXCamelback</div> <div>></div>	<div><div></div>Vice President</div> <div><div></div>Pittsburgh</div> <div><div></div>Financial Advisor</div> <div><div></div>PITOxford</div> <div>></div>	<div><div></div>Financial Advisor</div> <div><div></div>Raleigh</div> <div><div></div>Advice & Wellness</div> <div><div></div>Raleigh</div> <div>></div>	<div><div></div>Associate</div> <div><div></div>Raleigh</div> <div><div></div>Defined Contribution</div> <div><div></div>Raleigh</div> <div>></div>
<div>Hebenstreit, Kim</div> <div><div></div>Client Management Consultant</div> <div><div></div>Kansas City</div> <div><div></div>Wealth Client Service</div> <div><div></div>KANMain</div> <div>></div>	<div>Heckathorn, Allie</div> <div><div></div>Client Management</div> <div><div></div>Minnetonka</div> <div><div></div>Wealth Client Service</div> <div><div></div>MINRedcircle</div> <div>></div>	<div>Heckman, Blaise</div> <div><div></div>Financial Advisor</div> <div><div></div>Kansas City</div> <div><div></div>Relationship Manager</div> <div><div></div>KANMain</div> <div>></div>	<div>Hedtler, Rebecca</div> <div><div></div>Financial Advisor</div> <div><div></div>Raleigh</div> <div><div></div>N/A</div> <div><div></div>Raleigh</div> <div>></div>
<div>Heebe, Odom</div> <div><div></div>Vice President</div> <div><div></div>New Orleans</div> <div><div></div>Financial Advisor</div> <div><div></div>NOLAPoydras</div> <div>></div>	<div>Held, Jon</div> <div><div></div>Operations</div> <div><div></div>Minnetonka</div> <div><div></div>N/A</div> <div><div></div>MINRedcircle</div> <div>></div>	<div>Helmbrecht, Cory</div> <div><div></div>Financial Advisor</div> <div><div></div>Chesterton</div> <div><div></div>Relationship Manager</div> <div><div></div>Chesterton</div> <div>></div>	<div>Helmle, Harriet</div> <div><div></div>Senior Associate</div> <div><div></div>San Antonio</div> <div><div></div>Relationship Management</div> <div><div></div>SATNLoop-San Antonio</div> <div>></div>
<div><div><</div><div>1</div><div>5</div><div>6</div><div>7</div><div>16</div><div>></div></div>			
<div>No of employees per page: <div>100</div> <div>▼</div></div>			