



CAPTRUST Office List with Associated Advisors – 3/31/23

PLEASE NOTE: **Changes since the last version are highlighted.****RALEIGH, NC – HEADQUARTERS**

Brandon Aber, Jeremy Altfeder, Erica Blomgren, Keaton Brewer, Molly Brown, Ellen Crowley, Heather Darcy, John Davenport, Chad Day, Bob Eagle, Shaun Eskamani, Patrick Flint, John Garrett, Mike Gray, Michael Henderson, Wilson Hoyle, Mike Hudson, Donn Johnston*, DJ Johnston, Kathy Johnston*, Todd Jones, Wat Keys, Ryan Leach, Matt Leggett, Danny Lowe, John Martin, Mark Medlin, Fielding Miller, Kevin Monroe, Brian Pollard, Frank Pyles*, Anne Reed, Abigail Russell, Traynor Reitmeier, Brent Simpson, Heidi Spencer, Jason Stanicek, Jon Strickland, Danny Summerlin, Jimmy Talton, Kyle Tucker, Lydia Zabrycki
4208 Six Forks Rd., Ste. 1700
Raleigh, NC 27609
919-870-6822 or 800-216-0645

AKRON, OH - BR

Steve Wilt, Paul Stibich, Grey Kennedy (*Suzy Cottrill*)
222 South Main St., Ste. 220
Akron, OH 44308
330-535-4550

ALLENTOWN, PA (MFP-BETHLEHEM) - IA

Chris Butz, David Cacciabeve, Mark Chando, Jim Edwards, Jeff Evans, John Hopkins, Jennifer Kelly, Marcus Magyar, Zach McCann, Mike Molewski, Laura Morganelli, Wes Schantz, Kyle Shoemaker, David Will (*Amy Au*)
600 Hamilton St., Ste. 900
Allentown, PA 18101
610-865-2600

ATLANTA, GA (BUCKHEAD) (ERNST & YOUNG) – BR

Rick Bernhardt
3348 Peachtree Rd. NE, Ste. 1420
Atlanta, GA 30326
404-201-6472

ATLANTA, GA (PERIMETER) (FIDUCIARYVEST) – IA

Philly Jones, Zack Sadler, Evan Melcher (*Michelle Miller*)
2500 Northwinds Pkwy., Suite 250
Alpharetta, GA 30009
404-446-1270

AUSTIN, TX (INTRUST FIDUCIARY GROUP) – IA

MERGED WITH STMM-AUSTIN OFFICE.

AUSTIN, TX (STMM-4 LOCATIONS) – IA

SEE SAN ANTONIO-STMM

BETHLEHEM, PA (MCQUEEN BALL) – IA

Jerry McQueen, Chris Zavec, Michael Peters, Adam Beers, Chris Huber, **Jack Franceschina** (*Sara Faisetti*)
60 W. Broad St., Ste. 300
Bethlehem, PA 18018
610-954-0400

BIRMINGHAM, AL (MONROEVOS):

SEE HOUSTON

BIRMINGHAM, AL - MERGED**WELCH HORNSBY (2 LOCATIONS) – IA**

Paul Owen, Phillip Anderson, Kim Elliott, Don Lutomski, John Maloney, Catherine Bragg (*Lauren Stallings*)

2614 19th Street South
Homewood, AL 35209
205-949-6040

MONROE VOS: Tim Callahan (Robin Willingham)

• 205-879-6824

• **MONTGOMERY, AL (WELCH HORNSBY)**

Eddie Welch, Robin Godwin, Oliver Haynes, Brian Mitchell, Alan Bishop (*Kristina Mann*)
One Commerce St., Ste. 800
Montgomery, AL 36104
334-272-1192

BOERNE, TX (COVENANT):

SEE SAN ANTONIO

BOSTON, MA – BR - MERGED

BOSTON ADVISORS: Mike Vogelzang, Keith Faulkner, Larry Manning, John Peterson, Lauren Lambert, Kris Stewart, Cara Cannon, Bob Auditore, Mike Pratico, Michael O'Brien, **Beverly Rodriguez** (*Evelina Glynn*)

Rinet: Brian Rivotto, Annmarie Cottage, Kathaleen Coelho, Karyn Courtney, Ben Goldman, Josh Hohlfelder, Andrew Kuleszka, Tom Keane, Eric Lipa, Chris Mahoney, Rebecca Pouliot, Beth Raymond, Gary Savage, Ona Vredenburg (*Amanda MacDonald, Linda Coleman, Beverly Rodriguez*)

One Liberty Square, 13th Floor
Boston, MA 02109

617-348-3100 – Boston Advisors

617-488-2700 – Rinet

BRENTWOOD, TN (TRUSTCORE) – BR**NOW ON CAPTRUST NETWORKS**

Gary Dean, Jefferson Adcock, Matt Bader, Brad Caldwell, Darryl Edmonds, Mickey Jacobs, Mikael Jacobs, Randy Lee, Jane MacDonald, Erik Milam, Kevin Mitchell, Craig Reed, Tyler Sinclair, Cliff Taylor, David Steine, Wade Bilbrey, Mary Clapp, Drew Digby, Susan Harris, Philip Henninger, Chanon MacDonald, Andrew Mitchell, Taylor Morrison, Seth Powell, John Sinclair, Russell Slagle, Burton Williams, William Reed

5341 Maryland Way, Ste. 300
Brentwood, TN 37027
615-377-1177

CHARLOTTE, NC (JONES/BLAIR) – BR

Bob Jones, Mike Blair, William Blair, Land Hite, George Kroustalis, **Will Moody**, Jim Strodel (*Barb Nazak*)

4201 Congress St., Ste. 160
Charlotte, NC 28209
704-927-0360

CHESTERTON, IN (LAKESIDE WEALTH) – BR

Mark Chamberlain, Chip Mang, Tim Rice, Tim VerSchure, Aaron Adcock, Ed Cheatham, Craig Draper, Kris Hornyak, John Masterson, Tom Muldowney, Kelly Shikany, Mike DeLeon, Chris Frain, Kirk Futrell, Chris Ylo, Cory Helmbrecht, Megan Marshall, Melinda Reineke (*Kristin Lange*)

3100 Village Point, Ste. 200
Chesterton, IN 46304
219-926-1182

CHICAGO, IL (ELLWOOD – 2 LOCATIONS) – IA

Kristi Bieber Gibbs, Kyle Clifford, Tim Egan, Alex Farquhar, Dan George, Elliot Greenberg, Chris Krawkowski, Ellen Martel, Joe Marzano, Scott Meggenberg, Chuck Mohr, Andy Schwark, Dan Simon, Brian Thrasher, Aaron Ward, Matt Winton, Allie Pennington (*Timre Surrey, Samantha West*)

33 W. Monroe St., Suite 1000
Chicago, IL 60603
312-782-5432

• **GREENWOOD VILLAGE, CO - IA (ELLWOOD)**

Dale Connors, Katie Eldred, Sarah Falgiatano, Andy Fiegel, Paul Schreder and Kevin Yoshida
5299 DTC Blvd., Suite 810
Greenwood Village, CO 80111
303-738-0300

CINCINNATI, OH (HBK) – BR

Josh Haire and Bridget Mitchell
9078 Union Centre Blvd., Ste. 102
West Chester, OH 45069
Phone: 513-273-0350

COLUMBIA, MD – NBR

John Zick (Home)
7399 Kindler Rd.
Columbia, MD 21046
301-351-2787

COLUMBIA, MO – NBR

John Weber (Home)
1707 South Oaks Dr.
Jefferson City, MO 65101
800-216-0645

CORPUS CHRISTI, TX (STMM-4 LOCATIONS) – IA

SEE SAN ANTONIO - STMM

DALLAS, TX – BR

John Pickett, Travis Whitten, Brandon Martineson, and David Mize
5950 Sherry Lane, Ste. 460
Dallas, TX 75225
214-622-6020

DALLAS, TX (COVENANT)

SEE SAN ANTONIO

DAYTON, OH (PC&J) – BR

Ryan Lee (Sue Lucas)
7812 McEwen Rd., Ste. 400
Dayton, OH 45459
937-223-0600

**DES MOINES, IA – BR**

Jean Duffy, AJ Morris, AJ Shimp, Troy Anderson
(Sheri Elsen)

5745 Raccoon River Dr., Suite 160
West Des Moines, IA 50266
515-657-4100

DES MOINES, IA (GENERATIONS)

Julie Fuller, Michelle Mahoney (Amy Underhill)
5745 Raccoon River Dr., Suite 160
West Des Moines, IA 50266
515-444-8367

DETROIT (CLARKSTON), MI* – BR

Casey Pogodzinski, John Young (Amy Sheridan)
8031 M-15 (Ortonville Rd.), Ste. 200
Clarkston, MI 48348
248-620-8100

DOYLESTOWN, PA* – BR

Rick Shoff, Paul Schaffer, Scott Wertheim*,
Chris Kulick*, Jeff Loehwing*, Sean Teesdale,
Scott Mulvaney (Suzanne Coppola)
1980 South Easton Rd., Ste. 210
Doylestown, PA 18901
215-348-8811

FOLSOM, CA (PIC – PACIFIC INVESTMENT CONSULT.)

William Altavilla, Scott Gordon, Debbie
Hightower, Ryan Jantzen, Chris Reeg, Christine
Peterson (Raquel Altavilla)
1130 Iron Point Rd., Suite 100
Folsom, CA 95630
916.932.0150

FORT COLLINS, CO

Drew McCorkle
201 South College Ave. Ste. 207
Fort Collins, CO 80524
404-395-9990 - Mobile

FORT WORTH, TX (OMEGA WEALTH)-NEW**NOT YET ON CAPTRUST NETWORKS**

Tom Hardgrove, John Dickens, Tammy Bryant,
Carter Vaughan

300 Throckmorton St., Suite 1450
Fort Worth, TX 76102
817-335-5739

FOXBORO, MA (PATRIOT PENSION ADV.)

Ted Burke, Michelle Marchionni
38 Mechanic St., Suite 203
Foxboro, MA 02035
508.543.5700

GLENDALE, CO (FRONTIER) - NEW

SEE KANSAS CITY, MO

GRAND RAPIDS, MI (PLANTE MORAN-2 LOCATIONS) -IA

Dori Drayton, Jeremy Tollas (Lisa Mason)
99 Monroe Avenue NW, Suite 901
Grand Rapids, MI 49503
616-643-4011

- SOUTHFIELD, MI (PLANTE MORAN)- IA**

Susan Shoemaker, Jeremy Chambers,
Justin Domber, Brett Reardon, Casey
Veach, Errol Hau, Aaron Ward
3000 Town Center, Suite 2650
Southfield, MI 48075
248-223-3765

GREEN, OH (CORNERSTONE) – IA

Mario Giganti, Mark Fearigo, Nathan Bopp, Glen
Hahlen, Amanda Bernier, Dan Harsh, Lisa Hay, Jared
Milhoan, Mark Muntean, (Ginny Curran and Rhea
Rieger)

1640 Corporate Woods Circle
Uniontown, OH 44685
330-896-6250

GREENSBORO, NC (MORTON WEALTH MGMT.) – IA

Steve Morton, Walter Abele, Jonathan Stoller,
Phillip Epting (Susan Barnes)
628 Green Valley Rd., Ste. 206
Greensboro, NC 27408
336-294-8585

GREENSBURG, PA (PWA-2 LOCATIONS) - IA

SEE PITTSBURGH, PA - PWA

GREENVILLE, SC - MERGED OFFICES – 3/31/23

NNP: Bob Nachman, Ben Norwood, Russ Miller,
Maura Copsey, Wes Boyce, Al Cannon, Gary
Davis and Carter Hall (Holly Melton)
1116 S Main Street
Greenville, SC 29601
864-467-9800

REYNOLDS: Tom Reynolds, Jason Lewis, Christine
Cunningham, Harrison Collins, Madyson Swobe
(Cheryl Rawlings)
864-232-8670

GREENWICH, CT – BR

Ernest Liebre, Bruce Graham
83 Mason St.
Greenwich, CT 06830
203-869-0033

GREENWOOD VILLAGE, CO (ELLWOOD-2 LOCATIONS)

SEE CHICAGO, IL - ELLWOOD

HARRISONBURG, VA (ROGERS FINANCIAL) – BR

Ken Rogers and Jenifer Nesselrodt
2262 Blue Stone Hills Dr., Ste. B
Harrisonburg, VA 22801
888-427-5290

HOUSTON, TX (MONROE VOS-2 LOCATIONS) -**NOW ON CAPTRUST NETWORKS**

Tim Vos, Jason Martinez
1001 McKinney St., Suite 1730
Houston, TX 77002
713-227-0100

- BIRMINGHAM (MONROE VOS)**

Merged with 19th St. South Location– 3/31/23

Tim Callahan (Robin Willingham)
205-879-6824

HOUSTON, TX (STMM-4LOCATIONS)-IA

SEE SAN ANTONIO – STMM

JOHN MATEJKA IS NOW IN THIS OFFICE

IRVINE, CA (NEW MARKET-2 LOCATIONS) - IA

SEE NASHVILLE, TN

JACKSON, MS - NBR

JOHN MANGUM (HOME), TAYLOR NOWELL
150 Summerwood Dr.
Jackson, MS 39208
919-349-8459 – Cell

KANSAS CITY, MO (FRONTIER- 6 LOCATIONS) – BR**MOVING TO A NEW SPACE IN JULY/AUG**

Nick Blasi, Sidni Dohm, Laura Greenbaum, Clay
Hartman, Blaise Heckman, Mark Howe, Tory
Kerr, Deann Mitchell, Matt Taylor, Sarah Cathey
(Chris Zuendel)
4435 Main St., Suite 650
Kansas City, MO 64111
816.753.5100

- GLENDALE, CO (FRONTIER)**

- All working from home:
Dickson Griswold, (Valeria Chacon-FL)
650 S. Cherry St., Suite 630
Glendale, CO 80246

- LONE TREE, CO (FRONTIER)**

- All working from home: Jill Rogers,
Richard Rogers (Shannon Nielsen)
10375 Park Meadows Dr., Ste. 500
Lone Tree, CO 80124

- OMAHA, NE (FRONTIER)**

- Mike Karstens, Darren Obrecht, Steve Olafson,
Mark Johnson (Korbyn Fox)
10250 Regency Circle, Suite 100
Omaha, NE 68114
402.492.2727

- ST. LOUIS, MO (FRONTIER)**

- Janelle Correnti, Joe Pesnell (Sandy Kelly)
1401 S. Brentwood Blvd., Suite 925
St. Louis, MO 63144
314.762.6800

- WICHITA, KS (FRONTIER)**

- Ben Christensen, Rob Fee, John Jenkins,
Doug Jenkins, David Neal, Rob Richardson
(Lynell McGinnis)
1625 N. Waterfront Pkwy., Suite 150
Wichita, KS 67206
316.689.8333

LAKE SUCCESS, NY (FCE) – BR

Fred Sloan, David Schwartz, Alan Kleinberg,
Claude Molosiu, Marilyn Schaja, Kathy Waters,
Veronica Karas, Michael Lenzo, Peggy
Whitmore*, Gio Tiso, Jesse Malik, Alexa Hladick
(Shana Benoit and June Farias)

3 Dakota Dr., Ste. 310
Lake Success, NY 11042
516-487-8220

LEXINGTON, KY (CAMMACK)

SEE NEW YORK, NY

LEXINGTON, VA (D&G)

SEE LYNCHBURG, VA

LONE TREE, CO (FRONTIER)

SEE KANSAS CITY, MO

LONE TREE, CO (SHINE WEALTH PARTNERS) - IA

Judith Shine, Beth Cornell, Elisabeth Jacobson,
Karen Salvatore, Peter Vander Ploeg, Brandon
Bineau, Ally Ecklund (Tracey Maggio, ~~Joel~~
~~Larsen~~, Patty Treccia)
9892 Rosemont Avenue, Suite 100
Lone Tree, CO 80124
303-740-8600

LOS ANGELES, CA – BR

~~MARK DAVIS~~, KAREN CASILLAS, JONATHAN STOLLER
2625 Townsgate Rd., Ste. 330
Westlake Village, CA 91361
818-483-1590-Mark
818-483-1104-Karen

LYNCHBURG, VA (D&G) (2 locations) – IA

Jack Flippin, Bill Paxton, Marcus Borel and Lewis
Thomas (Kathy Burnley)
925 Main St., Ste. 200
Lynchburg, VA 24504
434-847-6600

- LEXINGTON, VA**

- Dave Hansen
15C North Randolph St.
Lexington, VA 24450
540-464-9100



MINNEAPOLIS, MN – IA

333 South 7th St., Ste. 2900
Minneapolis, MN 55402

Dan Esch, Evan Holmes, Lisa Tobey, Allen Weisz
952-358-3400 – Keeping Phone

Ty Estlick, David Koch, Chad Griffith and Josh Hill (*Jeri Hausmann*)

612-347-7979 – Keeping Phone

MONTGOMERY, AL (WELCH HORNSBY-2 LOCATIONS) – IA

SEE BIRMINGHAM, AL

NASHVILLE, TN (NEW MARKET) – IA

Daryl Deke, David Ramsour, Rush Benton
(*Rachel Meeker*)

1222 Demonbreun St., Suite 1235

Nashville, TN 37203

615-750-1567

- **IRVINE, CA, OFFICE CLOSED.- KELLY GENTLES IS WORKING FROM HOME.**

NEW ORLEANS, LA (CRESCENT CAPITAL CONSULTING)-IA

Andrew Wisdom, Bryan Fitzpatrick, Rod Rodriguez, Luis Zervigon, Ryan Adkerson, Michael deYoung, Odom Heebe, Richard Rodriguez, Sheridan Grace

1100 Poydras St.

Energy Center, Suite 1350

New Orleans, LA 70163

504-207-8555

NEW YORK, NY (CAMMACK-2 locations) – BR

Jeff Levy, Earl Allen, Michael Sanders, Emily Wrightson, Elina Babadzhanova, Jared Hardin, Tim Irvin, Jess Morris, Joey Payne*, Jan Rezler, Mike Webb, Rob Peel, Marcia Riveglia-Peters
(*Peta Jarrett*)

40 WALL ST., 56TH FLOOR

NEW YORK, NY 10005

212-227-7770

- **WELLESLEY, MA (CAMMACK)**
Currently working from home: Mike Volo, John Buckley, Rebecca Hedtler, Jennifer Stevens, Jennifer Barker
They will use the Boston office for client meetings only when necessary.

NORTH MIAMI, FL – IA

SEE TAMPA, FL

OKLAHOMA CITY, OK (COVENANT)

SEE SAN ANTONIO

OMAHA, NE (FRONTIER) – NEW

SEE KANSAS CITY, MO

ORLANDO, FL – BR

MOVING TO A NEW SPACE IN JUNE/JULY

Dan DiGiacomo and Sydney Jennings (*Jen Janczewski*)

801 International Pkwy., Fifth Fl.

Lake Mary, FL 32746

407-505-4556

ORLANDO, FL (KAIROS)- BR

MOVING TO A NEW SPACE IN JUNE/JULY

Taylor Bauerle (Anna Bauerle)

801 International Pkwy., Ste. 500

Lake Mary, FL 32746

407.878.1229

PHOENIX, AZ (MRA-2 locations) – IA

Mark Feldman, Chris Berghthold, John Brimhall, Christina Burroughs, Ena Dashi, Nathan Erickson, Evan Judge, James LaMancusa, Brad Lemon, Trevor Moore, Ryan Penniman, Kyle Pitman, Carol Romney, Allie Russo, Audrey Scroggs, Jessica Vasilic, David Westra, Carli Young, Eric Ensign, Will Froelich, MaryAnn Hennelly-Favata, **Jordan Isquith**, JT Vandegriff
(*Sarah Stayton, Deb Mosakowski, Maria Mendolia-P/T*)

3200 East Camelback Rd., Ste. 300

Phoenix, AZ 85018

602-468-1232

- **WAYZATA, MN (MRA)**
Jennifer Arps, Bruce Paulson
1907 Wayzata Blvd., Ste. 200
Wayzata, MN 55391

PITTSBURGH, PA (PWA-2 LOCATIONS) – IA

Jeff Heasley, Joe (JC) Howard, Patrick Marlatt
(*Melanie Pettinato*)

One Oxford Centre, 301 Grant St., Ste. 2925

Pittsburgh, PA 15219

412-931-2700

- **GREENSBURG, PA (PWA) – IA**
Joe Scarpo, Anthony Scarpo, Keith Biskup, Mike Passalinqua, Nick Wilson (*Marcie Werner*)
542 Rugh Street, Suite 1000
Greensburg, PA 15601
724-830-8800

PRAIRIE VILLAGE, KS (DANDA TROUVÉ) –

MOVING TO A NEW SPACE IN JULY/AUG

Michelle Trouvé, Ashley Preston

8201 Mission Rd., Suite 200

Prairie Village, KS 66208

913-262-1108

RICHMOND, VA (PALMER & CAY) – NBR

Beryl Ball – 804-241-8928

3309 Manor Grove Circle

Glen Allen, VA 23059

Barry Schmitt – 804-363-1248

Fran Slacum, FARM – 678-634-1073

4005 Huntstead Way

Richmond, VA 23233

RIVERSIDE, CA (SPINOFF: BEACON POINT) – IA

James Valmonte, Teri Parker – **Working from Home**

TailoredSpace Virtual Office for Mail

Rebecca@tailoredspace.com

951-755-0044

3600 Lime St., Bldg. 2

Riverside, CA 92501

ROANOKE, VA (CATAWBA CAPITAL) – IA

Terry Crowgey, Jay Irons and Mandy Crowgey-Wells, Tyler Pugh (*Maxine Dooley*)

10 South Jefferson St., Ste. 1210

Roanoke, VA 24011

540-342-1212 – Office

ROSEVILLE, CA (GB&B – 2 LOCATIONS)

SEE SACRAMENTO, CA – GB&B

SACRAMENTO, CA (GB&B-2 LOCATIONS) – BR

Peter Ashby, Kelly Brothers, Alex Brown, Lon Burford, Mike Genovese, Mark Huffman, John Lockwood, Pam Rodriguez, Lauren Ralston and Scott Thomas (*Briana Villapudua*)

740 University Avenue

Sacramento, CA 95825

916-713-0833

- **ROSEVILLE, CA (GB&B)**

Brian Abad, Randy Byard, Kevin Chang, Kyle Clark, Wil Gabri, Rod Waterbury, Andrew Costello

1410 Rocky Ridge Drive, Ste. 150

Roseville, CA 95661 - 916-713-0833

SALT LAKE CITY, UT (KNOX CAPITAL) – BR/IA

Brodie Barnes, Stan Kimball, Brett Johnson, Chris Jeppson, Kaylie Tomadakis, Jake Miller (*Martha Henderson*)

13961 S. Minuteman Dr., Ste. 300

Draper, UT 84020

801-984-8000

SAN ANTONIO, TX (COVENANT-4 LOCATIONS)-IA

David Akright, John Eadie, Harriet Helmle, John Keeton, Raquel Lopez, Trevor Mansour, Tommy Oliphint, Justin Pawl, George Pedraza, David Wallace, **LeeAnn Iacona** (*Melinda Alexis*)

4372 N Loop 1604 W, Suite 116

San Antonio, TX 78249

210-403-5350

- **BOERNE, TX (COVENANT) – IA**

Karl Eggerss, Casey Keller, Shawn Morris

and Britni Mosher (**Jennifer Boling**)

114 E Highland Drive

Boerne, TX 78006

210-526-0057

DALLAS, TX ((COVENANT) – IA

May Atassi, Barry Beal, Mark Nokyos, Noel Strickling (**Abygail Pena**)

14643 Dallas Parkway, Suite 320

Dallas, TX 75254

214-361-4458

- **OKLAHOMA CITY, OK (COVENANT) – IA**

Scott Duncan, Ollie Norman and Anzaldua Simon

6305 Waterford Boulevard, Suite 120

Oklahoma City, OK 73118

405-810-7730

SAN ANTONIO, TX (STMM-4 LOCATIONS) – IA

Heather Caussade, Kim Cornwell, Lisa Gostkowski, Lance Lahourcade, Christina Lechopel, Madelon Leone, Michelle Scarver, Sherry Thiltgen, **Reid Martens** (**Bertha Moreno**)

700 N. Saint Mary's St., Suite 100

San Antonio, TX 78205

210-824-8916

- **AUSTIN, TX (STMM) – IA**

Lisa Danford*, Julia Gavrilov, Lisa Miller, Sam Dreibelbis, Pete DiNardo, Catherine Ellis, Kim Cornwell, Kirkland Caison, (Dai-Lynn Jackson)

115 Wild Basin Road South, Ste. 225

Austin, TX 78746

512-342-2272

- **CORPUS CHRISTI, TX (STMM) – IA**

Mary Hime and **Denna Patterson**

921 N. Chaparral Street, Suite 112

Corpus Christi, TX 78401

361-904-0551

- **HOUSTON, TX (STMM) – IA**

David Stix, Jon Matejka

777 S. Post Oak Ln, Ste. 2055

Houston, TX 77056

713-683-3818



SAN RAMON, CA (WATERMARK) – IA

Mark Miller, Rosanne Costello, Lyle Brandt, Dave Fernandez, Ted Lew, Andrew Costello
2010 Crow Canyon Place, Ste. 210
San Ramon, CA 94583
925-648-4730

SANTA BARBARA, CA – NBR

Devyn Duex, Deanna Bamford, Taria Agbelusi
The Santa Barbara office at 24 East Cota St. has been closed. Mail directed to Raleigh. Devyn, Taria and Deanna are currently working from home. See below.

ST. LOUIS, MO (FRONTIER) - NEW

SEE KANSAS CITY, MO

STOCKBRIDGE, GA (STEWARDSHIP) – BR

Charles Pyke, Jr., Matt Godleski, Shane Hunter and Patrick Plunkett (*Traci Carver, Aria Stewart*)
345 Corporate Center Court
Stockbridge, GA 30281
770-507-0025

• **SATELLITE OFFICE**

3525 Piedmont Road, 3rd Floor
Peachtree City, GA 30269

SOUTHFIELD, MI (PLANTE MORAN-2 LOC.) - IA

SEE GRAND RAPIDS, MI

TAMPA, FL (CAPTRUST-2 LOCATIONS) – BR

Eric Bailey, Matt Doyle, Jeb Graham, John Griffith, Scott Lowke, Bo Perry, Robert Piccirilli, Shale Latter, Kipp Small, Chase Burkhart, Mike Valone, Kyle Campbell, Greg Schott (*Laura Weigand*)
400 N. Tampa St., Ste. 1800
Tampa, FL 33602
813-218-5000 – Office

• **NORTH MIAMI, FL – IA**

STEPHEN SCHOTT, **BRENDA ALFARO**
1801 NE 123rd St., Ste. 314, Office 320
North Miami, FL 33181
New #: 305-892-0420

WARREN, NJ (PEI-PORTFOLIO EVALUATION) - IA

Michael Sasso, Rich Torbinski, Attila Toth, Mike Amberger, Jared Anderson, Lorice Bianchi, David Hudak, Edward Landsman, Greg McCarthy, Duncan McNiff, Scott Rubin and Dan Urban (*Fana Horenbein*)
15 Independence Blvd.,
Warren, NJ 07059
973-538-4347

WASHINGTON, D.C. (REGUS) – IA

Mike Hudson uses it regularly
1050 Connecticut Ave. NW, Ste. 1000
Washington, DC 20036
703-584-6526

WAYZATTA, MN (MRA) – BR

SEE PHOENIX - MRA

WELLESLEY, MA (CAMMACK)

SEE NEW YORK, NY

WELLESLEY HILLS, MA (AEVITAS)

NOT YET ON CAPTRUST NETWORKS

Michael Schreiber, Amy Resnic, Marisa Muldowney, Corey Stein
10 Laurel Avenue, Suite 100
Wellesley Hills, MA 02481
781-239-1180

WICHITA, KS (FRONTIER) - NEW

SEE KANSAS CITY, MO

WILMINGTON, DE – IA

Cathy Seeber (Home)
33513 Bridgehampton Lane
Lewes, DE 19958
302-740-2432

WILMINGTON, NC (FOUNTAIN FINANCIAL) – BR

Vinton Fountain, Buck Beam, Christopher Riley, Brice Gibson, and Thompson Schollaert (*Colleen Johnson*)
1209 Culbreth Dr., Suite 100
Wilmington, NC 28405
910-256-8882

WILMINGTON, NC (IRONGATE) – BR

MERGING WITH CULBRETH DR. – June/July

Steve Coggins, David Hartness, Evan Cumalander, Cleve Nordeen, Lil Mercer, Susan Willett (Nicole Nelson)
2601 Iron Gate Drive, Suite 201
Wilmington, NC 28412
910-791-1437

***Advisors Working from Home:**

- Agbelusi, Taria: 805.208.1846 - 1160 Corte Riviera, Camarillo, CA 93010
- Bamford, Deanna: 916.759.0454 - 1781 Heather Garden Lane, Roseville, CA 95661
- Barker, Jennifer: 617.955.9912
- Boyd, Sara
- Buckley, John: 617.835.8749
- Cornwell, Kim
- Danford, Lisa
- DiNardo, Pete
- Duex, Devyn: 3101 Foothill Road, Santa Barbara, CA 93105
- Ellis, Catherine: 913-424-4612 - 110 Navajo Trail, Georgetown, TX 78633
- Fox Danford, Lisa: 512.698.9718 - Moved to FL and working from home
- Gavrilov, Julia
- Griswold, Dickson
- Hau, Errol: 734.925.2444 - 968 Madison St., Birmingham, MI 48009
- Hedtler, Rebecca: 508.384.5070
- Johnston, Donn/Kathy: 215-646-0484 - 101 Manning Way, Durham, NC 27703
- Karstens, Mike
- Kulick, Chris: 215.527.1211 - 1 Ivy Lane, Villanova, PA 19085
- Loehwing, Jeff: 610.428.4965 - Ship to Allentown office until further notice.
- **Mellone, Nicholas – Remote, VA**
- Miller, Lisa
- Nowell, Taylor: 662-312-6380: 1770 Robertson Place Dr., Hernando, MS 38632
- Parker, Teri: 951-826-9338 – Mail to Riverside Virtual Office above
- Payne, Joey: 859-286-1040 - 948 Village Green Ave., Lexington, KY 40509
- Rogers, Jill
- Rogers, Richard
- Slacum, Fran: 678-634-1073: 608 Totten Place NE, Washington DC 20017
- Stevens, Jennifer: 508.423.1470
- Teesdale, Sean: 215-620-6506: 433B Salmon St., Philadelphia, PA 19125
- Valmonte, James: 714-422-4497– Mail to Riverside Virtual Office above
- Volo, Mike: 617.519.7804
- Wertheim, Scott: 973.590.1296 - 14 Cedar Gate Drive, Livingston, NJ 07039
- Whitmore, Peggy: 516.946.9290 - 25 Bayview Ave., Port Washington, NY 11050
- Zabrycki, Lydia: 559.284.0370 - Cambria, CA



CAPTRUST

CAPTRUST Office List with Associated Advisors – 3/31/23

PLEASE NOTE: **Changes since the last version are highlighted.**



A screen shot from the AKO2023 Hype Video (Ben Farmer) that can be found in Allego.