

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

Nazak, Barbara

Senior Administrative Associate

Charlotte

Administrative Professionals

Charlotte

Neal, David

Senior Vice President

Wichita

Financial Advisor

KANMain

Neeley, Clair

Client Management Consultant

Oklahoma City

Wealth Client Service

KANMain

Nelson, Nicole

Client Management

Wilmington

Wealth Client Service

WILMlrongate

Nesselrodt, Jenifer

Senior Financial Advisor

Harrisonburg

Relationship Manager

Harrisonburg

Nguyen, Linh

Senior Associate

Phoenix

Tax

PHXCamelback

Nicolai, Amy

Associate

Wayzata

Tax Operations

PHXCamelback-Wayzata

Nielsen, Grant

Retirement Counselor

Salt Lake City

Advice & Wellness

Salt Lake City

Nokyos, Mark

Senior Vice President

Dallas

Financial Advisor

SATNLoop-Dallas

Nolan, Josee

Client Management Consultant

Charlotte

Wealth Client Service

Charlotte

Noon, Christopher

Senior Bookkeeper

Boston

Family Office

Boston

Noonan, Christopher

Client Management Consultant

Wellesley Hills

Wealth Client Service

WELLLaurel

Noonan, Roger

Financial Advisor

Raleigh

N/A

Raleigh

Nordeen, Cleve

Vice President

Wilmington

Financial Advisor

WILMlrongate

Norman, Oliver

Vice President

Oklahoma City

Financial Advisor

SATNLoop-Oklahoma City

Norwood, Ben

Principal

Greenville

N/A

GNVMMain

Nosovitch, Brendan

Financial Advisor

Allentown

N/A

Allentown

Nowell, Danny

Associate II

Raleigh

Vendor Analysis

Raleigh

Nowell, Taylor

Financial Advisor

Raleigh

N/A

Raleigh

Nunery, Justin

Associate | Quality Assurance Engineer

Raleigh

IT Application Development

Raleigh

<p>Nunez, Kaylin</p> <ul style="list-style-type: none"> Senior Associate Raleigh Marketing Raleigh 	<p>O'Brien, Michael</p> <ul style="list-style-type: none"> Senior Associate Boston Investments Boston 	<p>O'Connell, Michael</p> <ul style="list-style-type: none"> Specialist Boston Performance Reporting Boston 	<p>O'Donohue Brian</p> <ul style="list-style-type: none"> Client Management Consultant Charlotte Institutional Client Service N/A
<p>O'Rourke, Bryan</p> <ul style="list-style-type: none"> Intern Wilmington Wealth Client Service WILMlongate 	<p>Obrecht, Darren</p> <ul style="list-style-type: none"> Vice President Omaha Financial Advisor KANMain 	<p>Ogden, Matt</p> <ul style="list-style-type: none"> Director Raleigh Investment Research Raleigh 	<p>Olafson, Steve</p> <ul style="list-style-type: none"> Vice President Omaha Financial Advisor KANMain
<p>Olinick, Ella</p> <ul style="list-style-type: none"> Associate San Antonio Tax Operations SATNLoop-San Antonio 	<p>Oliphint, Tommy</p> <ul style="list-style-type: none"> Senior Vice President San Antonio Financial Advisor SATNLoop-San Antonio 	<p>Olis, Bonita</p> <ul style="list-style-type: none"> Senior Client Management Associate Roanoke Wealth Client Service Roanoke 	<p>Oliva, Dante</p> <ul style="list-style-type: none"> Intern Raleigh Marketing Raleigh
<p>Olson, Kyle</p> <ul style="list-style-type: none"> Principal Minnnetonka N/A MINRedcircle 	<p>Omo, Connor</p> <ul style="list-style-type: none"> Associate Chicago Performance Reporting CHIWMonroe-Chicago 	<p>Opatich, Crystal</p> <ul style="list-style-type: none"> Manager Clarkston Institutional Client Service Michigan 	<p>Owen, Paul</p> <ul style="list-style-type: none"> Principal Homewood Financial Advisor Birmingham
<p>Owens, Ashley</p> <ul style="list-style-type: none"> Client Management Consultant Lynchburg Wealth Client Service Lynchburg 	<p>Owens, Blake</p> <ul style="list-style-type: none"> Senior Associate Raleigh Performance Reporting Raleigh 	<p>Owens, Emily</p> <ul style="list-style-type: none"> Intern Chesterton Institutional Client Service Chesterton 	<p>Paleocrassas, Nick</p> <ul style="list-style-type: none"> Director Raleigh Nonqualified Executive Benefits Raleigh
<p>Pallatta, Gary</p> <ul style="list-style-type: none"> Manager Warren Vendor Analysis 	<p>Palma, Aisha</p> <ul style="list-style-type: none"> Senior Specialist Lake Success Financial Planning 	<p>Pals, Alex</p> <ul style="list-style-type: none"> Client Management Consultant West Des Moines Institutional Client Service 	<p>Palsgrove, Lauren</p> <ul style="list-style-type: none"> Project Manager Raleigh Project Management

WARIndependence >	Lake Success >	Des Moines >	Raleigh >
<p>Papik, Steven</p> <ul style="list-style-type: none"> Intern Raleigh Asset/Liability Raleigh > 	<p>Parker, Akiema</p> <ul style="list-style-type: none"> Client Management Consultant Stockbridge Wealth Client Service ATLCorp > 	<p>Parker, Teri</p> <ul style="list-style-type: none"> Vice President Riverside Financial Advisor Riverside > 	<p>Pasquale, Marie</p> <ul style="list-style-type: none"> Senior Manager Raleigh Asset/Liability Raleigh >
<p>Passalacqua, Michael</p> <ul style="list-style-type: none"> Vice President Pittsburgh Financial Advisor PITOxford > 	<p>Patrick, Matthew</p> <ul style="list-style-type: none"> Senior Manager Raleigh Defined Contribution Raleigh > 	<p>Patrylak, Erica</p> <ul style="list-style-type: none"> Specialist Doylestown Institutional Client Service & Ops Doylestown > 	<p>Patterson, Chris</p> <ul style="list-style-type: none"> Associate II Security Engineer Raleigh IT Information Security & Network Raleigh >
<p>Patterson, Evan</p> <ul style="list-style-type: none"> Specialist Raleigh Defined Contribution Raleigh > 	<p>Patton, Shalethia</p> <ul style="list-style-type: none"> Account Manager Raleigh Advice & Wellness Raleigh > 	<p>Paulson, Bruce</p> <ul style="list-style-type: none"> Senior Financial Advisor Wayzata N/A PHXCamelback > 	<p>Pawl, Justin</p> <ul style="list-style-type: none"> Principal San Antonio Financial Advisor SATNLoop-San Antonio >
<p>Paxton, William</p> <ul style="list-style-type: none"> Principal Lynchburg Financial Advisor Lynchburg > 	<p>Payne, Joey</p> <ul style="list-style-type: none"> Senior Financial Advisor Lexington N/A NYCWall > 	<p>Pearce, Mikaela</p> <ul style="list-style-type: none"> Intern Raleigh Wealth Client Service Raleigh > 	<p>Pearson, Kara</p> <ul style="list-style-type: none"> Senior Consultant Raleigh Human Resources Raleigh >
<p>Pedraza, George</p> <ul style="list-style-type: none"> Vice President San Antonio Financial Advisor South Texas-San Antonio > 	<p>Peel, Robert</p> <ul style="list-style-type: none"> Financial Advisor New York N/A NYCWall > 	<p>Pena, Abygail</p> <ul style="list-style-type: none"> Client Management Associate Dallas Wealth Client Service SATNLoop-Dallas > 	<p>Pendzick, Bradley</p> <ul style="list-style-type: none"> Financial Advisor Bethlehem Financial Planning Bethlehem Downtown >
<p>Penha, Nate</p> <ul style="list-style-type: none"> Senior Client Management Consultant 	<p>Penniman, Ryan</p> <ul style="list-style-type: none"> Principal 	<p>Pennington, Allie</p> <ul style="list-style-type: none"> Financial Advisor 	<p>Perkins Yan, Chris</p> <ul style="list-style-type: none"> Associate II Software Engineer

<ul style="list-style-type: none"> 📍 Tampa 🔗 Institutional Client Service 🏢 Tampa 	<ul style="list-style-type: none"> 📍 Phoenix 🔗 Financial Advisor 🏢 PHXCamelback 	<ul style="list-style-type: none"> 📍 Chicago 🔗 Relationship Manager 🏢 CHIWMonroe-Chicago 	<ul style="list-style-type: none"> 📍 Raleigh 🔗 IT Application Development 🏢 Raleigh
<p>Perkins, Ellen</p> <ul style="list-style-type: none"> 👤 Senior Specialist 📍 Phoenix 🔗 Tax 🏢 PHXCamelback 	<p>Perritt, Elizabeth</p> <ul style="list-style-type: none"> 👤 Client Management Consultant 📍 Wilmington 🔗 Wealth Client Service 🏢 N/A 	<p>Perry, Samuel</p> <ul style="list-style-type: none"> 👤 Principal 📍 Tampa 🔗 Financial Advisor 🏢 Tampa 	<p>Person, Quinton</p> <ul style="list-style-type: none"> 👤 Senior Associate 📍 Raleigh 🔗 Defined Contribution 🏢 Raleigh
<p>Pesnell, Joe</p> <ul style="list-style-type: none"> 👤 Senior Vice President 📍 St. Louis 🔗 Financial Advisor 🏢 KANMain 	<p>Peters, Marcia</p> <ul style="list-style-type: none"> 👤 Senior Financial Advisor 📍 Warren 🔗 Portfolio Management 🏢 WARIndependence 	<p>Peters, Michael</p> <ul style="list-style-type: none"> 👤 Principal 📍 Bethlehem 🔗 Financial Advisor 🏢 Bethlehem Downtown 	<p>Petersen, Christine</p> <ul style="list-style-type: none"> 👤 Senior Associate 📍 Folsom 🔗 Relationship Management 🏢 SACIronPoint
<p>Peterson, John</p> <ul style="list-style-type: none"> 👤 Senior Vice President 📍 Boston 🔗 Financial Advisor 🏢 Boston 	<p>Pettinato, Melanie</p> <ul style="list-style-type: none"> 👤 Specialist 📍 Pittsburgh 🔗 Integration 🏢 PITOxford 	<p>Pettit, Isabella</p> <ul style="list-style-type: none"> 👤 Intern 📍 Raleigh 🔗 Institutional Client Service 🏢 Raleigh 	<p>Pham, Paul</p> <ul style="list-style-type: none"> 👤 Client Management Consultant 📍 Lake Success 🔗 Wealth Client Service 🏢 Lake Success
<p>Phillip Samuel, Clerise</p> <ul style="list-style-type: none"> 👤 Manager 📍 Raleigh 🔗 Marketing 🏢 Raleigh 	<p>Phillips, Natalie</p> <ul style="list-style-type: none"> 👤 Senior Associate 📍 Phoenix 🔗 Finance 🏢 PHXCamelback 	<p>Phoung, Pharin</p> <ul style="list-style-type: none"> 👤 Client Management Associate II 📍 Boston 🔗 Wealth Client Service 🏢 Boston 	<p>Piazza, Laura</p> <ul style="list-style-type: none"> 👤 Client Management Consultant 📍 Lake Success 🔗 Wealth Client Service 🏢 N/A
<p>Piccirilli, Robert</p> <ul style="list-style-type: none"> 👤 Principal 📍 Tampa 🔗 Financial Advisor 🏢 Tampa 	<p>Pickering, Kelly</p> <ul style="list-style-type: none"> 👤 Senior Manager 📍 Tampa 🔗 Wealth Client Service 🏢 Tampa 	<p>Pickett, John</p> <ul style="list-style-type: none"> 👤 Senior Vice President 📍 Dallas 🔗 Financial Advisor 🏢 Dallas 	<p>Pierce, David</p> <ul style="list-style-type: none"> 👤 Associate Software Engineer 📍 Raleigh 🔗 IT Application Development 🏢 Raleigh
<p>Pierce, Jim</p>	<p>Pierre, Tonda</p>	<p>Pinto, Mack</p>	<p>Pismenyuk, Natasha</p>

<div> <div>🏠</div> <div>Training Consultant</div> </div> <div> <div>🏠</div> <div>West Des Moines</div> </div> <div> <div>🔗</div> <div>Institutional Client Service & Ops</div> </div> <div> <div>🏢</div> <div>West Des Moines</div> </div> <div>></div>	<div> <div>🏠</div> <div>Senior Client Management Consultant</div> </div> <div> <div>🏠</div> <div>New Orleans</div> </div> <div> <div>🔗</div> <div>Wealth Client Service</div> </div> <div> <div>🏢</div> <div>NOLAPoydras</div> </div> <div>></div>	<div> <div>🏠</div> <div>Associate II</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div> <div>🔗</div> <div>Asset/Liability</div> </div> <div> <div>🏢</div> <div>Raleigh</div> </div> <div>></div>	<div> <div>🏠</div> <div>Operations</div> </div> <div> <div>🏠</div> <div>Houston</div> </div> <div> <div>🔗</div> <div>N/A</div> </div> <div> <div>🏢</div> <div>HOUMcKinney</div> </div> <div>></div>
<div>Pitman, Kyle</div> <div> <div>🏠</div> <div>Senior Analyst</div> </div> <div> <div>🏠</div> <div>Phoenix</div> </div> <div> <div>🔗</div> <div>Relationship Manager</div> </div> <div> <div>🏢</div> <div>PHXCamelback</div> </div> <div>></div>	<div>PJ Jarrett</div> <div> <div>🏠</div> <div>Executive Assistant</div> </div> <div> <div>🏠</div> <div>New York</div> </div> <div> <div>🔗</div> <div>Administrative Professionals</div> </div> <div> <div>🏢</div> <div>NYCWall</div> </div> <div>></div>	<div>Plomteaux, Marcel</div> <div> <div>🏠</div> <div>Senior Associate</div> </div> <div> <div>🏠</div> <div>Roseville</div> </div> <div> <div>🔗</div> <div>Financial Planning</div> </div> <div> <div>🏢</div> <div>SACUniversity-Roseville</div> </div> <div>></div>	<div>Plunkett, Carli</div> <div> <div>🏠</div> <div>Senior Associate</div> </div> <div> <div>🏠</div> <div>Phoenix</div> </div> <div> <div>🔗</div> <div>Relationship Manager</div> </div> <div> <div>🏢</div> <div>PHXCamelback</div> </div> <div>></div>
<div>Plunkett, Patrick</div> <div> <div>🏠</div> <div>Principal</div> </div> <div> <div>🏠</div> <div>Stockbridge</div> </div> <div> <div>🔗</div> <div>Financial Advisor</div> </div> <div> <div>🏢</div> <div>ATLCorp</div> </div> <div>></div>	<div>Pogodzinski, Casey</div> <div> <div>🏠</div> <div>Vice President</div> </div> <div> <div>🏠</div> <div>Clarkston</div> </div> <div> <div>🔗</div> <div>Financial Advisor</div> </div> <div> <div>🏢</div> <div>Michigan</div> </div> <div>></div>	<div>Polanco, Marina</div> <div> <div>🏠</div> <div>Manager</div> </div> <div> <div>🏠</div> <div>San Antonio</div> </div> <div> <div>🔗</div> <div>Tax</div> </div> <div> <div>🏢</div> <div>SATNLoop-San Antonio</div> </div> <div>></div>	<div>Pollard, Brian</div> <div> <div>🏠</div> <div>Senior Vice President</div> </div> <div> <div>🏠</div> <div>Raleigh</div> </div> <div> <div>🔗</div> <div>Financial Advisor</div> </div> <div> <div>🏢</div> <div>Raleigh</div> </div> <div>></div>

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