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				
LocationsDepartments	Eskamani, Shaun Principal Raleigh Financial Advisor Raleigh	Estlick, Tyron Principal Minneapolis Financial Advisor Minneapolis	Estrada, Rosa	Evaga, Louis
	Evans, James Senior Associate Raleigh Human Resources Raleigh	Evans, Jeff S. ' Senior Financial Advisor Allentown N/A Allentown	Evans, Juanita	Everett, Maribel Client Management Consultant Houston Wealth Client Service HOUMcKinney
	Faisetty, Sara Client Management Associate II Bethlehem Wealth Client Service BethlehemDowntown	Faith, Jessica Associate Raleigh Human Resources Raleigh	Falgiatano, Sarah Principal Greenwood Village N/A CHIWMonroe-Chicago	Falkowski, Kamil Manager Raleigh Asset/Liability Raleigh
	Farias, June Composition Senior Administrative Associate Composition Lake Success Composition Administrative Professionals Domain Lake Success	Farley, Gina Specialist Phoenix Finance PHXCamelback	Farmer, Ben Senior Associate Raleigh Marketing Raleigh	Farmer, Sarah Carter 合 Senior Associate Greenville Wealth Planning GNVMain
	Farquhar, Alex Principal Chicago N/A CHIWMonroe-Chicago	Faulkner, Keith Principal Boston Financial Advisor Boston	Fearigo, Mark Principal Uniontown Financial Advisor Green	Fee, Rob 一 Financial Advisor

Feldman, Mark	Feldman, Zack	Fernandez, Dave	Fernandez, Ramiro
→ Principal	☐ Lead Server Engineer	☐ Vice President	
⚠ Phoenix	企 Phoenix	企 San Ramon	合 San Antonio
Head of Tax Services	IT Infrastructure	⊘ Financial Advisor	Investment Research
PHXCamelback	□ PHXCamelback		☐ South Texas-San Antonio
,	,	,	
Ferrin, Jim	Fiegel, Andy	Fieldman, Kevin	Fielhauer, Callan
	Principal	□ Director	Client Management
∰ Minnetonka	命 Greenwood Village	命 Raleigh	命 Fort Worth
⊘ N/A	Ø N/A	Investment Strategist	Wealth Client Service
₩ MINRedcircle	CHIWMonroe-Greenwood Village	∰ Chicago	
>	>	>	
Finch, Trey	Fischer, Stephen	Fisher, Ann	Fitzpatrick, Bryan
○ Operations	Client Management Consultant	ტ Manager	☐ Principal
企 Brentwood	ம் San Antonio	ம் Warren	企 New Orleans
Ø N/A	Wealth Client Service	✓ Vendor Analysis Operations	⊘ N/A
₩ NASHMaryland	South Texas-San Antonio	WARIndependence	₩ NOLAPoydras
>	>	>	
Flink, Anne	Flint, Patrick	Flippin, Jack	Flores, Roseanna
↑ Team Leader	△ Vice President		△ Manager
⊕ Greenville	企 Raleigh	企 Lynchburg	企 Salt Lake City
			,
Wealth Planning	⊘ Financial Advisor	Financial Advisor	Wealth Client Service
	Financial Advisor	Financial Advisor	Wealth Client Service M Salt Lake City
Wealth Planning GNVMain	⊘ Financial Advisor	② Financial Advisor ① Lynchburg	⑦ Wealth Client Service
₩ GNVMain		₩ Lynchburg	☐ Salt Lake City
₩ GNVMain		₩ Lynchburg	☐ Salt Lake City
GNVMain >	Raleigh Foels, Tracie	Lynchburg Folkes, Robert	Salt Lake City Ford Caussade, Heather
g GNVMain > Flowers, Joe	Raleigh Foels, Tracie Manager	Lynchburg >	pp Salt Lake City Ford Caussade, Heather 小 Vice President
GNVMain Flowers, Joe Senior Client Management Consultant Chicago	双 Raleigh >> Foels, Tracie	Folkes, Robert Consultant New York	Salt Lake City Ford Caussade, Heather
GNVMain Flowers, Joe Senior Client Management Consultant Chicago Institutional Client Service	の Raleigh >> Foels, Tracie Manager Raleigh Performance Reporting	Folkes, Robert Consultant New York Relationship Management	Ford Caussade, Heather Vice President San Antonio Financial Advisor
GNVMain Flowers, Joe Senior Client Management Consultant Chicago Institutional Client Service	双 Raleigh >> Foels, Tracie	Folkes, Robert Consultant New York	Ford Caussade, Heather 'D' Vice President 'D' San Antonio Financial Advisor South Texas-San Antonio
GNVMain Flowers, Joe Senior Client Management Consultant Chicago Institutional Client Service	の Raleigh >> Foels, Tracie Manager Raleigh Performance Reporting	Folkes, Robert Consultant New York Relationship Management NYCWall	Ford Caussade, Heather 'D' Vice President 'D' San Antonio Financial Advisor South Texas-San Antonio
GNVMain Flowers, Joe Senior Client Management Consultant Chicago Institutional Client Service	の Raleigh >> Foels, Tracie Manager Raleigh Performance Reporting	Folkes, Robert Consultant New York Relationship Management NYCWall	Ford Caussade, Heather 'D' Vice President 'D' San Antonio Financial Advisor South Texas-San Antonio
Flowers, Joe Senior Client Management Consultant Chicago Institutional Client Service CHIWMonroe-Chicago	Foels, Tracie Manager Raleigh Performance Reporting Raleigh Fountain, Vinton	Folkes, Robert Consultant New York Relationship Management NYCWall Fox Danford, Lisa	Ford Caussade, Heather Vice President San Antonio Financial Advisor South Texas-San Antonio
Flowers, Joe Senior Client Management Consultant Chicago Institutional Client Service CHIWMonroe-Chicago Fortunato, Joe	Foels, Tracie Manager Raleigh Performance Reporting Raleigh Principal	Folkes, Robert Consultant New York Relationship Management NYCWall Fox Danford, Lisa	Ford Caussade, Heather Vice President San Antonio Financial Advisor South Texas-San Antonio Fox, Korbyn Client Management Consultant
GNVMain Flowers, Joe Senior Client Management Consultant Chicago Institutional Client Service CHIWMonroe-Chicago >	Foels, Tracie Manager Raleigh Performance Reporting Raleigh Fountain, Vinton	Folkes, Robert Consultant New York Relationship Management NYCWall Fox Danford, Lisa	Ford Caussade, Heather Vice President San Antonio Financial Advisor South Texas-San Antonio

Fox, Lilly Frain, Chris Associate Raleigh Marketing Raleigh Francher, Mark Franczak, Austin Associate Raleigh Nika Chief Human Resources Officer Raleigh Nika Chicago Performance Reporting Chicago Performance Reporting Chicago Performance Reporting Chicago Performance Reporting Raleigh New Orleans Raleigh Associate Raleigh Associate Raleigh New Orleans Raleigh Associate Ra	Franceschina, Jack Associate Bethlehem Frinancial Planning BethlehemDowntown Freifeld, Jeremy Corporate Counsel Raleigh Legal Raleigh Plancial Principal Phoenix Financial Advisor PHXCamelback	Fullen, Amy Senior Associate Allentown Business Development Allentown
Associate Associ	Associate Bethlehem Financial Planning BethlehemDowntown Freifeld, Jeremy Corporate Counsel Raleigh Legal Raleigh Principal Principal Phoenix Financial Advisor	Associate Raleigh Asset/Liability Raleigh Freiser, Jeff Account Manager Raleigh Advice & Wellness Raleigh Fullen, Amy Senior Associate Allentown Business Development Allentown
Associate Associ	Associate Bethlehem Financial Planning BethlehemDowntown Freifeld, Jeremy Corporate Counsel Raleigh Legal Raleigh Principal Principal Phoenix Financial Advisor	Associate Asset/Liability Raleigh Asset/Liability Raleigh Account Manager Advice & Wellness Raleigh Advice & Wellness Raleigh Advice & Wellness Raleigh Allentown Business Development Allentown
Associate Assoc	☐ Bethlehem ☐ Financial Planning ☐ BethlehemDowntown Freifeld, Jeremy ☐ Corporate Counsel ☐ Raleigh ☐ Legal ☐ Raleigh ☐ Principal ☐ Principal ☐ Phoenix ☐ Financial Advisor	Asset/Liability Asset/Liability Raleigh Freiser, Jeff Account Manager Raleigh Advice & Wellness Raleigh Fullen, Amy Senior Associate Allentown Business Development Allentown
## Raleigh Francher, Mark Franczak, Austin	Freifeld, Jeremy Corporate Counsel Raleigh Legal Raleigh Principal Phoenix Financial Advisor	Freiser, Jeff Account Manager Advice & Wellness Raleigh Advice & Wellness Raleigh Advice & Wellness Baleigh Allentown Business Development Allentown
Francher, Mark Chief Human Resources Officer Raleigh N/A Raleigh Performance Reporting CHIWMonroe-Chicago French, Alice French, Alice French, Alice French, JJ Associate Raleigh New Orleans Tax Associate Raleigh NoLAPoydras Fuller, Julie Futrell, Kirk Chicago Performance Reporting Raleigh French, JJ Financial Advisor Raleigh Chesterton	Freifeld, Jeremy Corporate Counsel Raleigh Legal Raleigh Principal Phoenix Financial Advisor	Freiser, Jeff Account Manager Raleigh Advice & Wellness Raleigh Fullen, Amy Senior Associate Allentown Business Development Allentown
Francher, Mark Chief Human Resources Officer Raleigh N/A Raleigh Chicago Performance Reporting CHIWMonroe-Chicago CHIWMonroe-Chicago Associate Raleigh Associate Raleigh Associate Raleigh Raleigh Raleigh Raleigh Raleigh Asset/Liability Raleigh Vice President Ruller, Julie Futrell, Kirk Chiesterton Chesterton	Freifeld, Jeremy Corporate Counsel Raleigh Legal Raleigh Froelich, Will Principal Phoenix Financial Advisor	Freiser, Jeff Account Manager Raleigh Advice & Wellness Raleigh Fullen, Amy Senior Associate Allentown Business Development Allentown
Chief Human Resources Officer Raleigh N/A Raleigh Chicago Performance Reporting CHIWMonroe-Chicago French, Alice French, JJ Associate Raleigh Associate Raleigh Associate Raleigh Raleigh Raleigh Raleigh Value Fuller, Julie Futrell, Kirk Chesterton Chicago	Corporate Counsel Raleigh Legal Raleigh Froelich, Will Principal Phoenix Financial Advisor	Freiser, Jeff Account Manager Raleigh Advice & Wellness Raleigh Fullen, Amy Senior Associate Allentown Business Development Allentown
Chief Human Resources Officer Raleigh N/A N/A Performance Reporting CHIWMonroe-Chicago CHIWMonroe-Chicago Associate Raleigh Associate Raleigh New Orleans Tax NOLAPoydras Prench, JJ Associate Raleigh Raleigh Associate Raleigh	Corporate Counsel Raleigh Legal Raleigh Froelich, Will Principal Phoenix Financial Advisor	Account Manager Raleigh Advice & Wellness Raleigh Fullen, Amy Senior Associate Allentown Business Development Allentown
Chief Human Resources Officer Raleigh N/A Raleigh Chicago Performance Reporting CHIWMonroe-Chicago CHIWMonroe-Chicago Associate Raleigh New Orleans Tax Associate Raleigh Raleigh Raleigh Saset/Liability Raleigh Fuller, Julie Futrell, Kirk Chicago French, JJ Raleigh French, JJ Associate Raleigh French, JJ Futrell, Kirk Chicago Performance Reporting Raleigh French, JJ Chesterton Chesterton	Corporate Counsel Raleigh Legal Raleigh Froelich, Will Principal Phoenix Financial Advisor	Account Manager Raleigh Advice & Wellness Raleigh Fullen, Amy Senior Associate Allentown Business Development Allentown
Raleigh N/A Performance Reporting CHIWMonroe-Chicago CHIWMonroe-Chicago Associate Raleigh Associate Raleigh New Orleans Tax NOLAPoydras Fuller, Julie Futrell, Kirk Futrell, Kirk Financial Advisor Chesterton Chesterton	Raleigh Legal Raleigh Froelich, Will Principal Phoenix Financial Advisor	© Raleigh ⊘ Advice & Wellness □ Raleigh Fullen, Amy □ Senior Associate □ Allentown ⊘ Business Development □ Allentown
Performance Reporting CHIWMonroe-Chicago French, Alice Associate Raleigh New Orleans Tax Asset/Liability Raleigh NOLAPoydras Fuller, Julie Futrell, Kirk Chicago	C Legal C Raleigh Froelich, Will Principal Phoenix Financial Advisor	Advice & Wellness Raleigh Fullen, Amy Senior Associate Allentown Business Development Allentown
French, Alice French, JJ Associate New Orleans Tax NOLAPoydras Fuller, Julie Fuller, Julie Futrell, Kirk Fuch Monroe-Chicago French, JJ Associate Releigh Asset/Liability Releigh Futrell, Kirk Futrell, Kirk Futrell, Kirk Chesterton Chesterton	Froelich, Will Principal Phoenix Financial Advisor	Fullen, Amy Senior Associate Allentown Business Development Allentown
French, Alice French, JJ Associate Raleigh Tax NOLAPoydras Fuller, Julie Futrell, Kirk Vice President West Des Moines French, JJ Associate Raleigh Asset/Liability Futrell, Kirk Futrell, Kirk	Froelich, Will Principal Phoenix Financial Advisor	Fullen, Amy Senior Associate Allentown Business Development Allentown
Associate New Orleans Tax NOLAPoydras Fuller, Julie Futrell, Kirk Vice President West Des Moines Associate Raleigh Asset/Liability Raleigh Futrell, Kirk Futrell, Kirk	合 Principald Phoenix⊘ Financial Advisor	Fullen, Amy Senior Associate Allentown Business Development Allentown
Associate New Orleans Tax NOLAPoydras Fuller, Julie Futrell, Kirk Vice President West Des Moines Associate Raleigh Asset/Liability Raleigh Futrell, Kirk Futrell, Kirk	合 Principald Phoenix⊘ Financial Advisor	☐ Senior Associate
© New Orleans © Tax © Asset/Liability © Raleigh NoLAPoydras Fuller, Julie Futrell, Kirk © Vice President © West Des Moines © Chesterton	⚠ Phoenix⊘ Financial Advisor	⚠ Allentown ⊘ Business Development ☑ Allentown
↑ New Orleans ↑ Tax ↑ Asset/Liability ↑ Raleigh ↑ Raleigh ↑ Raleigh ↑ Vice President ↑ West Des Moines ↑ Chesterton	⚠ Phoenix⊘ Financial Advisor	⊘ Business Development☑ Allentown
Tax NOLAPoydras Fuller, Julie Futrell, Kirk Vice President West Des Moines Asset/Liability Futrell, Kirk Futrell, Kirk	⊘ Financial Advisor	⊘ Business Development☑ Allentown
Fuller, Julie Futrell, Kirk Vice President West Des Moines Raleigh Futrell, Kirk Chesterton	PHXCamelback	
Fuller, Julie Futrell, Kirk 'D' Vice President Des Moines Chesterton		
つ Vice President		
⊕ West Des Moines ⊕ Chesterton	Gabbert, Shelby	Gabri, Will
	□ Intern	☐ Vice President
7 Financial Advisor Relationship Manager	ம் Phoenix	企 Sacramento
	⊘ Tax	Financial Advisor
DESRaccoon DESRaccoon	₩ N/A	SACUniversity-Sacramento
Gabrielli, Toni Gajowski, Sarah	Gallaway, Joelle	Galloway, Ramon
↑ Financial Advisor ↑ Senior Associate	☐ Team Leader	☐ Senior Administrative Associate
நி Bethlehem நி Raleigh	டு Raleigh	ம் Raleigh
Relationship Manager	⊘ Finance	Administrative Professionals
Bethlehem Downtown Raleigh	© Raleigh	
Gangi, Vikas Garland, Taylor	Garrett, Johnny	Garrett, Ken
☐ Lead Software Engineer ☐ Client Management		

企 Raleigh	∰ Brentwood	企 Raleigh	企 Phoenix
IT Application Development	Wealth Client Service	Financial Advisor	⊘ Tax
□ Raleigh □	₩ NASHMaryland	₩ Raleigh	□ PHXCamelback
>	<u> </u>	>	
Gartman, Justin	Garza, Ted	Gates, Debra	Gaul, Kyle J.
Consultant	△ Account Manager		□ Director
ሴ Raleigh	企 Raleigh	∰ Raleigh	企 Raleigh
⊘ Marketing	⊘ Advice & Wellness	⊘ Advice & Wellness	Project Management
TI Raleigh	Raleigh >	Raleigh	∭ Raleigh
Gavrilov, Julia	Geist, Amy	Genovese, Mike	Gentles, Kelly
5 Financial Advisor	Client Management Consultant	☆ Principal	☐ Specialist
☆ Austin	☆ Lone Tree	ட் Sacramento	
⊘ N/A	Wealth Client Service	Financial Advisor	Wealth Planning
South Texas-Austin	Colorado Lone Tree	SACUniversity-Sacramento	∭ IRVSpectrum
George, Dan Principal Chicago N/A CHIWMonroe-Chicago	Getz, Chrystal Senior Team Leader Raleigh Administrative Professionals	Gibson, Brice □ Vice President □ Wilmington □ Financial Advisor □ Wilmington NC	Giganti, Mario 中rincipal ① Uniontown 「Financial Advisor 」 Green
Gilbert, Kelly Senior Manager Raleigh Institutional Client Service Raleigh	Gillies, Devin ☐ Senior Retirement Counselor ☐ Salt Lake City ☐ Advice & Wellness ☐ Salt Lake City ☐ Salt Lake City	Gilmore, Haniah Associate Raleigh Marketing Raleigh	Gimeno, Raniero ☐ Financial Advisor ☐ Raleigh Ø Advice & Wellness ☐ Raleigh
Gladziszewski, Peter ☐ Senior Manager ☐ Boston ☐ Wealth Operations ☐ Boston	Glauser, Danika Client Relationship Manager Salt Lake City Wealth Client Service Salt Lake City	Glenn, Ginger Director Montgomery Integration Lead Montgomery AL	Glenn, Sonya Client Relationship Manager Raleigh Institutional Client Service Raleigh
Glinn, Elissa	Glinn, Valerie	Gloss, Sara	Glynn, Evelina

Client Management Associate II	☐ Associate	Director	Executive Assistant
ம் Warren	ம் Warren	企 Chicago	ம் Boston
Institutional Client Service	⊘ Bookkeeper	⊘ Finance	Investment Group
WARIndependence >			Boston
Godleski, Matt	Godwin, Rob	Goeke, Jane	Goff, Chris
			☐ Operations
☆ Stockbridge	价 Montgomery	企 Raleigh	⚠ Brentwood
Financial Advisor	⊘ Financial Advisor	⊘ N/A	⊘ N/A
ATLCorp	Montgomery AL	Raleigh	NASHMaryland
Golder, Meryl	Goldman, Ben	Goldstein, Ben	Gonzalez-Ruiz, Arnold
doidei, iviei yi	doluman, ben	Goldstelli, bell	Gonzalez-Kuiz, Affioid
□ Director	Principal	President	Senior Client Management Associate
企 Raleigh	命 Boston	ம் Raleigh	命 Raleigh
Human Resources	⊘ N/A	⊘ N/A	Institutional Client Service
	☐ Boston		☐ Raleigh
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