

SAGEVIEW ADVISORY GROUP ORGANIZATIONAL CHART BY LOCATION



ATLANTA, GA

Last	First	Role
Anderson	David	Retirement Plan Consultant
St. Clair	Jonathan	Chief Fiduciary Officer and Managing Director

AUSTIN, TX

Last	First	Role
Coelho	Michael	Managing Director
Hajek	Susan	Retirement Plan Consultant

BOSTON, MA

Last	First	Role
Casey	Kerrie	Retirement Plan Consultant
Fantoni	Maria	Retirement Plan Consultant
Forkey	Mark	Investment Consultant
Foster	Mark	Retirement Plan Consultant
Galinaro	Linda	Client Service Associate
Larareo	Vanessa	Account Executive
Popper	Stephen	Managing Director
Washburn	Erica	Retirement Plan Consultant

CHICAGO, IL

Last	First	Role
Anderson	Matt	Retirement Plan Consultant
Heine	Clint	Retirement Plan Consultant
Kaiser	Kevin	Investment Consultant
Lamb	Nick	Sr. Investment Advisor
Reagan	Chris	Managing Director

DALLAS, TX

Last	First	Role
Barton	Lucas	Managing Director

DENVER, CO

Last	First	Role
Roth	Wayne	Retirement Plan Consultant
Schmeits	Kevin	Account Executive

HONOLULU, HI

Last	First	Role
Edwards	Steven	Retirement Plan Consultant
Lum	David	Managing Director
Tsang	Ji Mi	Retirement Plan Consultant

HOUSTON, TX

Last	First	Role
Homan	Daniel	Principal and Actuarial Consultant

IRVINE, CA

Last	First	Role
Armijo	Mallory	Investment Analyst
Becker	Brock	Wealth Advisor
Bolger	Kyla	Account Executive
Byun	Michael	Compliance
Cardey	Kristen	Account Executive
Christ	Cathy	Retirement Plan Consultant
Coen	Dave	Wealth Advisor
Cosgrove	Marty	Investment Consultant
Demko	Tom	Managing Director
Donnelly	Christopher	Managing Director, Advisory Services
Hammonds	Matt	Managing Director, Institutional Services
Hendrickson	Mark	Chief Financial Officer
Katsnelson	Julie	Director of Marketing
Kim	Julie	Account Executive
Long	Randy	Founder and CEO
McCrary	James	Retirement Plan Consultant
McKellar	Valerie	Investment Analyst

IRVINE, CA (continued)

Last	First	Role
Pao	Christina	Senior Advisory Services Associate
Pfeil	Marek	Managing Director, Investment Research
Quirk	Dan	Senior Investment Advisor
Smith	Zack	Financial Advisor
Stinson	Garrett	Managing Director
Searles	Rebecca	Account Executive
Tarjan	Brenda	Retirement Plan Relationship Manager
Upham	Jon	President
Uribe	Andie	Account Executive
Wagner	Ed	Managing Director

KANSAS CITY, MO

Last	First	Role
Burnich	Benaiah	Wealth Advisor and Retirement Plan Consultant
Jennings	Joyce	Account Executive
Koehler	Greg	Wealth Advisor

KNOXVILLE, TN

Last	First	Role
Ginel	Rich	Investment Consultant
Hobbs	Natalie	Account Executive
Jahn	Nick	Retirement Plan Consultant
Keck	Kyla	Principal/Consulting Group
Khairollahi	Bijan	Investment Consultant
King	Sean	Principal
Lanning	Jessica	Wealth Management
Majors	John	Investment Consultant
Manaker	Ryan	Retirement Plan Consultant
Redd	Todd	Wealth Advisor
Stewart	Todd	Managing Director, Investment Research
Valentino	Charlotte	Wealth Advisor
Webster	Doug	Managing Director

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LOS ANGELES, CA

Last	First	Role
Kordonsky	Mark	Principal

MILWAUKEE, WI

Last	First	Role
Schaefer	Shelly	Retirement Plan Consultant

MINNEAPOLIS, MN

Last	First	Role
Gratton	Jeff	Chief Marketing Officer and Managing Director
Johnson	Heather	Account Executive
Noll	Bob	Investment Consultant

NASHVILLE, TN

Last	First	Role
Henry	James	Retirement Plan Consultant
Whittle	Larissa	Account Executive

OMAHA, NE

Last	First	Role
Raynor	Patrick	Investment Advisor

PASADENA, CA

Last	First	Role
Balbuena	Rodney	Managing Director
Purisima	Jennifer	Director of Client Service

PORTLAND, OR

Last	First	Role
O'Shaughnessy	Jake	Managing Director
Payment	Stuart	Retirement Plan Consultant
Torres	Rob	Retirement Plan Consultant

RICHMOND, VA

Last	First	Role
Barnes	Ken	Retirement Plan Consultant
Biggs	Howard	Managing Director
Biggs	Ryan	Retirement Plan Consultant
Boughner	Christian	Associate Consultant
Butner	Corie	Client Service Manager
Boxley	Diane	Principal
Dowd	Bill	Principal
Labott	Nichole	Managing Director
Reid	William	Principal
Skinner	Nancy	Actuarial Consultant
Verdelotti	Tony	Actuarial Consultant

SAN FRANCISCO, CA

ORINDA, CA

Last	First	Role
Chambers	Jon	Managing Director
Chambers	Tina	Sr. Retirement Plan Consultant

WOODSIDE, CA

Last	First	Role
Cheu	Ann	Retirement Plan Consultant
Nash	Mike	Executive Benefits
Patton	Robert	Managing Director
Posch	William	Retirement Plan Consultant
Shnapek	David	Retirement Plan Consultant
Weissman	Eric	Retirement Plan Consultant

WASHINGTON, D.C.

Last	First	Role
Evans	Jack	Managing Director and Chief Investment Counsel
Trethewey	Robert	Principal
Zachary	Rachel	Account Executive

WEST HARTFORD, CT

Last	First	Role
Burns	Tim	Managing Director

WEST PALM BEACH, FL

Last	First	Role
Bogart	Justin	Retirement Plan Consultant
Etzig	Maressa	Account Executive
Lobaugh	Tom	Executive Benefits
Petrone	Jeffrey	Managing Director
Walters	Stacy	Relationship Manager

