

ALIGNE

Wealth
Preservation
& Insurance
Services, LLC

Los Angeles | New York

MEET THE TEAM

Headquarters

1888 Century Park East
Suite 150
Los Angeles, CA 90067
Main Office: 310.407.2844
www.alignewealth.com

Maddy Bent

Executive Assistant

Phone: 310.407.2849

Email: maddy@alignewealthllc.com



- Schedule review meetings and appointments
- Change your personal /banking information on file
- Contribution/distribution request from your investment account or insurance policy
- Obtain copies of your statements, tax documents and performance reports
- Setup online access to your investment accounts

Jason Veris

Client Service Associate

Phone: 310.407.2809

Email: jason@alignewealthllc.com



- First point of contact for basic questions/concerns regarding your account or policy
- Initial discussion on possible changes to your existing account or policy
- Shares insights from conversations with your Senior Aligne Advisor (e.g., Ivan, Jonas, etc.)
- Touch-base on your goals/objectives so we remain up-to-date on any (un)anticipated changes

Jacob Weston

Portfolio Management Associate

Phone: 310.407.2817

Email: jacob@alignewealthllc.com



- Collaborates w/ Senior Aligne Advisor on new account funding and organizes tax-management strategy
- Provides informal portfolio reviews, based on recent Investment Committee Meetings minutes
- Critically examines current holdings held away from us, and shares findings with Senior Aligne Advisor
- Maintains formal Aligne Investment Committee minutes, research, and outlook analysis

Securities and investment advisory services offered through registered representatives of MML Investors Services, LLC, Member SIPC.
Supervisory Office: 4695 MacArthur Court, Suite 1000, Newport Beach, CA 92660, 949.660.1717. Aligne Wealth Preservation & Insurance Services, LLC is not a subsidiary or affiliate of MML Investors Services, or its affiliated companies.