MORAN WEALTH MANAGEMENT

THOMAS M. MORAN
Founder, Chief Executive Officer - Senior PIM Portfolio Manager

ADVICE & PLANNING

WILLIAM BANFIELD CFP®, CRPC®
President - Investment Officer

KYLEN MORAN
Senior Vice President, Chief of Staff

DONALD DRURY
Senior Vice President - Investments

MICHAEL MONGIN
Senior Vice President - Investments

BYRON DONALDS
Associate Vice President - Investments

JULIE SPIVY
Financial Advisor

HANK BROWN
Financial Advisor

PRACTICE MANAGEMENT & ADMINISTRATION

JULIE CUSSON
Managing Director, Chief Operating Officer

DAWN BARAKETT
Executive Administrative Assistant

MARISSA PLUMMER
Marketing Associate

STRATEGY & RESEARCH

EARL SISTRUNK, CFA®
Director of Trading

CHRISTINA SHAW, CIPM
Director of Risk Management

CHELSEA GANEY, CFA®
Portfolio Strategist

SHANE XU
Research Analyst

PATRICK MORAN
Research Associate

MEISIE SHONGWE
Support Specialist

CLIENT RELATIONS

ASHLEY BUBOLTZ
Co-Director of Client Relations
Compliance Officer

ANGEL NURSE
Co-Director of Client Relations

COREY GRANT, CFP®
Client Relationship Manager

RYAN FRANK, CFP®
Client Relationship Manager

PEGGY SUNDOOK
Client Relationship Manager

WES THOMPSON, CRPC®
Client Relationship Manager

KIM CREWS
Client Account Specialist

NICK GLEASON
Client Account Specialist

STEPHANIE DRACK
Client Account Specialist

LAUREN NIEBRUGGE
Client Account Specialist

OPERATIONS

KATHY HERGET
Operations Manager

KIM KOERT
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COOPER ALLIGOOD
Support Specialist

LUCCA DELCOMPARE
Support Specialist

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