

MORAN WEALTH MANAGEMENT

THOMAS M. MORAN AIF®

Founder | Chief Executive Officer | Senior PIM Portfolio Manager

ADVICE & PLANNING

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President

KYLEN MORAN
Senior Vice President
Chief of Staff

MICHAEL MONGIN
Senior Vice President

CHARLES CHESEBROUGH, CFA®
Senior Vice President

AARON SIMPSON
CFP®, CLU®, ChFC®, RICP®
Senior Vice President

JULIE SPIVY
Vice President - Investments
Financial Advisor

COREY GRANT
CFP®, ChFC®
Vice President

RYAN FRANK
CFP®, ChFC®
Vice President

MARGARET KARR
Vice President

PRACTICE MANAGEMENT & ADMINISTRATION

JULIE CUSSON
Managing Director
Chief Operating Officer

DAWN BARAKETT
Executive Administrative
Assistant

MARISSA PLUMMER
Marketing Associate

PEGGY SUNDOOK
Training & Development Officer

KIM KOERT
Training & Operations Officer

STRATEGY & RESEARCH

EARL SISTRUNK, CFA®
Director of Trading

CHRISTINA SHAW, CIPM
Director of Risk Management

CHELSEA GANEY, CFA®
Portfolio Strategist

COOPER ALLIGOOD
Registered Support Specialist

HANK BROWN
Investment Analyst

PATRICK MORAN
Investment Analyst

SHANE XU
Investment Analyst

MEISIE SHONGWE
Support Specialist

COOPER ALLIGOOD
Registered Support Specialist

CLIENT RELATIONS

ASHLEY BUBOLTZ
Co-Director of Client Relations
Compliance Officer

ANGEL NURSE
Co-Director of Client Relations

WES THOMPSON, CRPC®
Client Relationship Manager

NICK GLEASON
Registered Support Specialist

LAUREN NIEBRUGGE
Client Account Specialist

KIM CREWS
Client Account Specialist

STEFANIE DRACK
Client Account Specialist

JEFFREY LEBRITON
Client Account Specialist

JAMES PHELPS
Client Account Specialist

ALISA RAINES
Client Account Specialist

JOSEPH TRIBUANI
Support Specialist

MIA SAFRON
Support Specialist

KATHY HERGET
Operations Manager

LUCCA DELCOMPARE
Registered Support Specialist