

# MORAN WEALTH MANAGEMENT

## THOMAS M. MORAN AIF®

Founder | Chief Executive Officer | Senior PIM Portfolio Manager

### ADVICE & PLANNING

**DONALD DRURY**  
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 RICH**  
Vice President - Investments  
Financial Advisor

**COREY GRANT**  
CFP®, ChFC®  
Vice President

**RYAN FRANK**  
CFP®, ChFC®  
Vice President

**MARGARET KARR**  
Vice President

### PRACTICE MANAGEMENT & ADMINISTRATION

**DAWN BARAKETT**  
Executive Administrative  
Assistant

**MARISSA PLUMMER**  
Marketing Associate

**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

**PATRICK MORAN**  
Investment Analyst

**SHANE XU**  
Investment Analyst

**MEISIE SHONGWE**  
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

**MIA SAFRON**  
Support Specialist

**KATHY HERGET**  
Operations Manager

**LUCCA DELCOMPARE**  
Registered Support Specialist