

Platinum Council | Conference

The Ritz-Carlton, Key Biscayne Advisors and Guests

Debra Alberto
West Des Moines, IA

Sasha Azarmi
Veronica Azarmi
Beverly Hills, CA

Todd Baird
Dorota Baird
Dallas, TX

Jay Beaulieu
Linda Beaulieu
Radnor, PA
2026 Diamond Council

Brett Bellcase
Sherrill Bellcase
Bee Cave, TX

Joseph Benson
Atlanta, GA

Jim Best
Rebecca Best
Columbia, SC

Jeremy Blum
Andrea Blum
Seal Beach, CA

Jeff Blumenthal
Lori Blumenthal
Oklahoma City, OK

Daniel Boland
Heidi Muller
Atlanta, GA

Vince Bono
Reda Bono
Fresno, CA

Tama Borriello
Steve Rustik
Bellevue, WA

Andrew Britton
Andrea Britton
Fort Lauderdale, FL

Paul Bronzo
Purchase, NY
2026 Diamond Council

Marie Carney
Shannon Carney
Louisville, KY

Scott Carr
Heather Carr
Suffolk, VA

Matt Carroccio
Carolyn Carroccio
Washington, DC

Randy Cathcart
Anita Cathcart
Chesterfield, MO

Oliver Cervantes
Connie Cervantes
Seal Beach, CA

Steve Christensen
Amber Altarabulsi
Dallas, TX

Chris Clark
Chelsea Clark
Salt Lake City, UT

Chris Clark
Mary Clark
Winter Park, FL

Eric Corsini
Elizabeth Corsini
New York, NY

Andy Cummings
Kelly Bonilla
Orchard Park, NY

Steve Erenfryd
Traci Erenfryd
New York, NY

David Feller
Leslie Feller
Bellevue, WA

Ralph Femminella
Vero Beach, FL

Vincent Fiorentino
Sandra Halley
Greenwich, CT

Brian Firing
Beverly Hills, CA
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Jean Ann Fisher
Keith Fisher
Fort Worth, TX

Jason Ford
Savannah, GA

Timothy Fortune
Boston, MA

Rick Gallos
Beth Gallos
Charlotte, NC

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Ruby Gamboa

Albert Gamboa
El Paso, TX

Jen Garcia

Greg Meneshian
Encino, CA
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Bobby Gardner

Janette Gardner
Houston, TX

Doug Gerace

Laila Gerace
McLean, VA

Melissa Greer

Jason Greer
Houston, TX

Ken Haas

Emily Haas
San Francisco, CA

Robert Hamill

Jennifer Hamill
San Francisco, CA

Steve Hardy

Kathleen Hardy
Tyler, TX

Allan Herzog

San Francisco, CA

Daniel Heu-Weller

Merisa Heu-Weller
Bellevue, WA

Kevin Hildenbrand

Paige Hildenbrand
Naples, FL

Larry Holmes Jr.

Lutherville, MD

Kim Hunter

Randy White
Las Vegas, NV

Brent Jacobs

Maya Jacobs
Oxnard, CA

Tyler Jaques

Nicole Jaques
Lake Oswego, OR

Chris Jewell

Denise Eagan
Palm Beach, FL

Alex Joannides

Aliki Joannides
Seattle, WA

Jason Kane

Kylie Dardis
Bellevue, WA

Laith Khalaf

Beth Khalaf
Dublin, OH

Ben King

Lauren King
Kettering, OH

Michael Knuff

Lili Worthley
New York, NY

Timothy Koerper

Luann Koerper
Orlando, FL

David Lando

Misti Maddox
McLean, VA

Peter Landry

Teri Landry
Boston, MA

Greg Lee

AnnMarie Lee
Beverly, MA
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Howard Lorch

Connie Conover
Houston, TX

Robert May

Leah May
Sioux Falls, SD

Jeremy Mesches

Corinne Mesches
Scottsdale, AZ

Jim Monroe

Vicki Monroe
El Dorado Hills, CA

Will Murphy

Nicole Murphy
The Woodlands, TX
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Eric Netjes

Jamie Netjes
Sioux Falls, SD

Josh O'Brien

Alyssa O'Brien
La Jolla, CA

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The Ritz-Carlton, Key Biscayne Advisors and Guests

Jason Ogle

Lindsay Robertson
Minneapolis, MN

Michael Olmos

Suzane Olmos
Rolling Hills Estates, CA

Greg Owen

Raleigh, NC

Charles Parry

Kathy Parry
Salt Lake City, UT
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Chase Parry

Bridget Parry
Salt Lake City, UT

Chad Patton

Tracy Patton
Southlake, Texas

Deep Paul

Puja Paul
Laguna Beach, CA

Jay Poling

Tracy Poling
Richmond, VA

Peter Prentis

New York, NY
2026 Diamond Council

Virginia Price

Walter Price
San Francisco, CA

Julian Quasha

Kara Quasha
San Francisco, CA

Linda Rasheed

Michele Piccirillo
Beverly Hills, CA

Brian Reichenberger

Katie Reichenberger
Bloomington, MN

Jason Rice

Sara Rice
San Antonio, TX

Donnie Robbins

Dana Robbins
Cape May Courthouse, NJ

Susan Roker

Rick Cameron
Palm Beach, FL
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Craig Schwartz

Cassie Goeller
Philadelphia, PA
2026 Diamond Council

Scott Seltzer

Sammi Seltzer
Palm Beach, FL

Jonathan Sharaf

Lorraine Sharaf
Doylestown, PA

Barry Shatzman

Noel Tapper
Philadelphia, PA

Tripp Shreves

Cathyann Shreves
Washington, DC

Sam Sleiman

Kathia Dang
Salt Lake City, UT

Brian Snyder

Sarah Snyder
Chapel Hill, NC

Mark Soukup

Kimberly Soukup
Boston, MA

Mitch Stillman

Scottsdale, AZ

Derek Stoutland

Tyler Beutel
Beverly Hills, CA

Sam Sugg

Catherine Sugg
Raleigh, NC

Craig Swann

Danielle Swann
Dallas, TX

David Tannenbaum

Los Angeles, CA

John Taylor

Carey Taylor
Richmond, VA

Marcia Tillotson

Sharon Blalock
Charlotte, NC

Mark Vandeburgt

James Hartje
Encino, CA

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The Ritz-Carlton, Key Biscayne
Advisors and Guests

Josh Vanderveen

Palm Beach, FL

Gregory David Velho

Jason Tisdell

Winter Park, FL

Garrett Voge

Ava Voge

Irvine, CA

Randy White

Kim Hunter

Las Vegas, NV

David Wiercinski

Irina Carp

Winter Park, FL

Brian Wiese

Bee Cave, TX

John Williams

Kristin Williams

Paducah, KY

Bradley Wilson

Melanie Crum

Dallas, TX

Peter Wilson

Seattle, WA

Scott Worrell

Merry Worrell

Orlando, FL

Greg Zanolli

Cassie Zanolli

Roseville, CA

Robert Zeiger

Los Angeles, CA

Firm Leadership

Dave Altshuler

Western Divisional President

James Craven

Head of National Sales

Darrell Cronk

WIM Chief Investment Officer

Michele Damasco

Platinum Council Program Manager

Jen Dima

Head of Private Client Hedging &
Monetization

Tim Froehlich

Head of Investment Products

Sol Gindi

Head of Wells Fargo Advisors & WIM Client
Relationship Group
Celia Gindi

Heather Hunt-Ruddy

Central Divisional President
Bob Ruddy

Andre Mansour

Head of Artificial Intelligence

Mike McLaughlin

Southeast Divisional President

Amy Schoenherr

Director of Advisor Recognition, Platinum
Council

Barry Simmons

Northeast Divisional President

Zach Smith

Director of WIM Programs & Initiatives

Prasanna Someshwar

Head of Banking, Lending and Trust COE

Barry Sommers

Head of Wealth and Investment Management

Kim Ta

Head of WIM Shared Services & Branch
Support

Eve Varner

WIM Chief Product Officer

Strategic Relationship Partners

Anastasia Amoroso

Partners Group

Bree Barletto

Touchstone Investments

Casey Bayvel

PGIM Investments

Jen Bloodsworth

First Eagle Investments

Steve Candido

Nuveen

Brendan Canning

Lord Abbett

Tim Costanza

Touchstone Investments

Jim Cotchett

First Eagle Investments

Mark D'Arcy

Fidelity Investments

Tara D'Arcy

Eddy de Arcos

Nuveen

Shannon de Arcos

Jim Dilorenzo

PGIM Investments

Katherine Fleischmann

Russell Investments

Rob Gennari

Fidelity Investments

Claudine Gennari

Tommy Grout

Touchstone Investments

Brian Kirst

Touchstone Investments

Jordy McCall

Russell Investments

Sarah McCall

Pete Monty

First Eagle Investments

Paige Motusesky

Lord Abbett

Ray Olson

Nuveen

Suzy Olson

Sam Patsy

Partners Group

Bryan Sajjadi

Fidelity Investments

John Sievers

Partners Group

Mike Tagliaferro

PGIM Investments

Mark (MVK) Van Kouteren

Partners Group

Ginny Whitman

Lord Abbett