

Platinum Council | Conference

The Ritz-Carlton, Amelia Island Advisors and Guests

Bill Abeles
Beverly Abeles
Hagerstown, MD

Neal Abravanel
Linda Abravanel
Bethesda, MD

Tosha Adams
Larry Hrabusicky
O'Fallon, IL

Shweta Agarwal
Siya Sharma
San Jose, CA

Freddie Akers
Freddie Akers, Jr.
Atlanta, GA

Kory Altheide
Carlyn Altheide
Walnut Creek, CA

Charles Anderson
Nancy Agrillo
Grand Rapids, MI

Roy Apple
Sharon Apple
Palm Beach, FL

Robin Arias
Megan Arias
New York, NY

Jenn Armstrong
Chris Armstrong
Denver, CO

Rajan Arora
Adi Arora
Short Hills, NJ

Paul Baker
Amy Baker
Jenkintown, PA

Rob Barker
Holly Barker
Salt Lake City, UT

Billy Barnes
Caroline Kercsi
Williamsburg, VA

Stephen Bartoli
Jamie Bartoli
Lemoyne, PA

David Bartoli
Lemoyne, PA

Daniel Baskin
Elisa Yao
Palo Alto, CA

Jay Bavlish
Anthony Bavlish
Lemoyne, PA

Jeremy Baynes
Melissa Baynes
Hudson, OH

John Berger
Kristen Berger
Charlotte, NC

David Best
Debbie Best
Shelby, NC

Paolo Bicego
Crystal Bicego
Beverly Hills, CA

Amy Birnbaum
Tracy Brand
Austin, TX

Brandon Blanchard
Terry Blanchard
Irvine, CA

Kingsland Bland
Rebie Bland
Charleston, SC

Chris Blentzas
Catie Hanna-Blentzas
San Diego, CA

Bryce Bordwell
Kim Bordwell
Irvine, CA

Scott Bowman
Jen Bowman
Charlotte, NC

Mike Boyle
Kathy Boyle
San Diego, CA

Jim Breen
Kathy Breen
Fort Worth, TX

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William Bridell

Lisa Bridell
Birmingham, AL

Lawrence Brody

Robin Brody
Savannah, GA

Tim Brown

Betsy Brown
Walnut Creek, CA

Jeffrey Buk

Christine Buk
Walnut Creek, CA

Jared Burleson

Morgan Burleson
Panama City, FL

Drew Burns

Jenny Burns
Raleigh, NC

Shalene Caldwell

Tracey Duchek
Scottsdale, AZ

Eric Campman

Diane Campman
Cincinnati, OH

Brian Carey

Marilyn Graciani
San Jose, CA

Frank Carter

Rebecca Carter
Valdosta, GA

Gina Cereda

Jeff Cereda
Newport Beach, CA

Elliot Chang

Pasadena, CA

Todd Chase

Becca Chase
Winston-Salem, NC

Sean Chatman

Lida Chatman
Palo Alto, CA

John Chauvapun

Jeff Chauvapun
San Diego, CA

Gary Chiang

Val Chiang
Palo Alto, CA

Horacio Choi

Irvine, CA

Daniel Choplin

Angie Choplin
Winston-Salem, NC

Cheryl Christensen

Glenn Hall
Sarasota, FL

Dave Ciccone

Dasha Ciccone
McLean, VA

Peter Cleary

Tricia Cleary
Norwell, MA

Ken Coan

Mary Coan
McLean, VA

Mike Cole

Kim Cole
Charlotte, NC

Will David Coleman

Patti Coleman
Nashville, TN

Neil Cooper

Sheri Cooper
Deerfield, IL

Brian Cubler

Julia Collins
Sarasota, FL

Brian D'Amico

Bob Gilmore
Wayne, PA

Daren Dahmer

Robin Dahmer
Houston, TX

John D'Annunzio

Carol D'Annunzio
Dallas, TX

Peter DelGreco

Sue DelGreco
Waltham, MA

John DeMoors

Eleanor DeMoors
McLean, VA

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Angie Denham

Scott Sheets
Baton Rouge, LA

Mark Denny

Sarah Taylor
Paramus, NJ

Todd Devin

Lisy Devin
Palm Beach, FL

Darin Dewsnap

Melanie Dewsnap
Salt Lake City, UT

David Diaz

Monique Fox
Boulder, CO

Sam Dickson

Cheryl Dickson
Ponte Vedra Beach, FL

Jeff Diel

Kari Diel
Milwaukee, WI

Steve Dilling

Barb Dilling
Fond Du Lac, WI

Keith Dunton

Kathie Dunton
Waukesha, WI

Kurt Eftikides

Meagan Knoop
Tampa, FL

Reiko Evangelista

Jimmy Ikeda
Palo Alto, CA

Ira Feld

Carla Feld
Baton Rouge, LA
2026 Diamond Council

Steven Feng

Palo Alto, CA

Dana Fenili

Bill Fenili
Green Bay, WI

Dan Fienberg

Lori Fienberg
Los Angeles, CA

Jim Fong

Jane Fong
Waltham, MA

Joseph Frank

Elayne Frank
Walnut Creek, CA

David Freeman

El Segundo, CA

Brandon Gioia

Allison Gioia
Paramus, NJ

Mark Gleckner

Sharon Gleckner
Marlton, NJ

Chad Glessman

Jessica Venable
Houston, TX

Nathan Golz

Heidi Golz
Aberdeen, SD

Kostas Grigorakis

Rita Yung
Corte Madera, CA

Michael Gully

Suzanne Gully
Short Hills, NJ

Louis Gutierrez

Gretchen Seager
Pasadena, CA

Baxter Hahn

Tracy Hahn
Florence, SC

Julia Hamon

Philip Hamon
San Antonio, TX

Tom Harsanyi

Kelly Harsanyi
McLean, VA

Ken Hayes

Lucy Hayes
Knoxville, TN

Quentin Heffron

Mina Heffron-Ayala
Albuquerque, NM

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Rob Henneberger
Salt Lake City, UT

Christine Hermosillo
Michelle Bui
Pasadena, CA

Steve Heslinga
Tracy Heslinga
Hyannis, MA

Paul Heslinga
Hannah Shapiro
Hyannis, MA

Tommy Hidell
Holly Hidell
Atlanta, GA

Kendall Higginbotham
Ponte Vedra Beach, FL

John Higgins
Sandra Higgins
Charlottesville, VA

Thai Hoang
Danay Hoang
Irvine, CA

Katie Hobbs
Brent Hobbs
Visalia, CA

Mike Hodan
Kathy Hodan
Milwaukee, WI

Michael Hopkins
Angela Hopkins
The Villages, FL

Tom Hopkins
Sandy Hopkins
Radnor, PA

Jon Hoskins
Mindy Hoskins
Visalia, CA

Joe Irvin
Stacey Irvin
Warrenton, VA

Vicki Ispas
Kim Smith
Merrillville, IN

Dave Jager
Lori Jager
Palm Desert, CA

Kevin Jaggie
Sanette Jaggie
Santa Rosa, CA

Jane Jenkins
Debbie Niemeier
Richmond, VA

Carlos Jimenez
Trey Vicknair
La Jolla, CA

Jeff Jones
Laurie Jones
Charleston, SC

Ariana Jordan
Mick Jordan
Rancho Santa Fe, CA

Kevin Jusko
New York, NY

Jake Kane
Wendy Kane
Williamsville, NY

Carl Kawabe
Amy Meunier
Newport Beach, CA

Ted Kawahara
Helen Kawahara
Rolling Hills Estates, CA

Jill Kelly
Chad Kelly
Sun City Center, FL

Joy Kenefick
Chris Kenefick
Charlotte, NC

Andrew Kevlahan
Melissa Kevlahan
Paramus, NJ

Peter Kien
Lara Kien
McLean, VA

Tom Kim
Jae Kim
El Segundo, CA

Thomas Kim
William Kim
Irvine, CA

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Alan Kinney

Rhonda Kinney
Savannah, GA

Eric Kohlmeier

Liz Galderisi
Short Hills, NJ

Shawn Kolar

Brandy Kolar
Naples, FL

Chris Kozo

Katherine Kozo
La Jolla, CA

Pete Krzyzak

Stephanie Krzyzak
Orlando, FL

Stephen Laddy

Jenn Laddy
Paramus, NJ

Mike LaLoggia

Mary LaLoggia
Rockford, IL

Brett Langbert

Rocky Langbert
Palm Beach, FL

David Lee

Linda Lok
Winter Park, FL

Alissa Lee

Chris Cheng
San Jose, CA

Adam Lewis

Dana Lewis
Cherry Creek, CO

Sean Lewis

Leah Lewis
Frisco, TX

David Lu

Nadine Lu
San Diego, CA

Travis Luebbehusen

Amanda Luebbehusen
Chesterfield, MO

Ivy Luu

Mark Lin
San Jose, CA

Jerome Lynch

Lisa Lynch
Louisville, KY

Ann Lyon

Lee Lyon
Jacksonville, FL

JP Mackay

Meredith Mackay
Knoxville, TN

John Madden

Melissa Madden
Austin, TX

Tom Mahowski

Jan Mahowski
Sarasota, FL

Judy Mak

William Chan
San Francisco, CA

Kaivon Maknoon

Maria Maknoon
Pittsburgh, PA

Maher Malaab

Breeann Malaab
San Diego, CA

Kathleen Malone

Jason Bone
Charlotte, NC

Sue Mamer

LeAnn Jamison
Anaheim, CA

Erwel Manlapid

Charina Manlapid
San Diego, CA

Bart Martinez

Nora Martinez
San Diego, CA

Kyle Mays

Cassandra Mays
The Woodlands, TX

Paul Mazziotti

Kim Mazziotti
Naples, FL

Jason McDonald

Amber McDonald
Austin, TX

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Mark McNeight

Ginger McNeight
Cumming, GA

Bob McQuillan

Jolynne McQuillan
Houston, TX

Brent Meadows

Jane Meadows
Lakeland, FL

Steve Menendez

Julie Menendez
Pinehurst, NC

David Meyer

Traci Calabrese Meyer
Asheville, NC

Bryan Midura

Laura Midura
Charlotte, NC

Steve Minor

Victoria Minor
Annapolis, MD

Lee Minsk

Jamie Minsk
New York, NY

Sean Navage

Shallan Navage
Scottsdale, AZ

Joe Nelson

Anna Flynt
Palo Alto, CA

Ashley Nguyen

Chad Eng
San Jose, CA

Andrea Nicolopoulos

Steve Giannini
Oak Brook, IL

Austin Olds

Maria Olds
Greenwood Village, CO

James Ong

Nikki Phan
Palo Alto, CA

Bill Orlando

Cecily Orlando
McLean, VA

Peggy Orson

Marshall Orson
Atlanta, GA

Brody Orton

Elizabeth Orton
Holladay, UT

Brenda Osborne

Rob Osborne
Beverly Hills, CA

Minesh Patel

Vishakha Patel
Paramus, NJ

Alesia Patterson

Rodger Patterson
Carbondale, IL

Jim Percifield

Amy Percifield
Merrillville, IN

Scott Phillips

Salt Lake City, UT

Chris Phillips

Lindsey Phillips
Orlando, FL

Ashley Pigg

Bee Cave, TX

James Platzer

Heather Marie Platzer
Mount Pleasant, SC

Jeffrey Polcar

Courtney Polcar
Pepper Pike, OH

Brandon Potter

Alyssa Potter
Lexington, KY

Sam Pratt

Alise Pratt
Charlotte, NC

Tony Priore

Lourdes Priore
Fort Lauderdale, FL

Karlynn Quist

Helen Demooy
Boise, ID

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Lisa Ragland

Rod Ragland
Dallas, TX

Todd Raquet

Linda Raquet
Tampa, FL

David Rascoe

Jasmine Ruiz
San Diego, CA

Barak Raviv

Indre Raviv
Los Angeles, CA

Steve Rice

Jeannie Rice
Birmingham, AL

Ed Riley

Johanna Berry
New Haven, CT

Anthony Rizzo

Lisa Rizzo
Palm Beach, FL

Richard Robbins

Barbara Robbins
Marlton, NJ

Curtis Roberts

Sue Roberts
Appleton, WI

Thomas Robinson

Karen Robinson
Boston, MA

Leo Robinson

Laura Buonopane
Boston, MA

Robert Rose

Jenna Rose
Tampa, FL

Yuriy Royzman

Erika Royzman
Houston, TX

Angie Sabel

Wil Sabel
New York, NY

Ramin Saeedian

Tara Hamidian
Short Hills, NJ

Severo Sales

Gemma Sales
Wyomissing, PA

Floyd Sandoval

Youngae Sandoval
Seattle, WA

David Schneeweiss

Naples, FL

James Schneider

Carol Schneider
McLean, VA

Jeremy Schneider

Lauren Schneider
Palm Beach, FL

Bryan Schon

Birmingham, MI

Walt Schwenk

Mary Ann Schwenk
Palm Beach, FL

John Scott

Tamara Grace
Los Angeles, CA
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Paul Sercer

Caroline Sercer
Charlotte, NC

Bobbi Shah

Anita Shah
Princeton, NJ

Nick Sicina

Kimberly Sicina
Warrenton, VA

Kenneth Simon

Kristin Jacka
Boston, MA

Ed Sipe

Zizi Sipe
Harrisonburg, VA

Charles Sisson

Donna Sisson
McLean, VA

Robert Sklar

Boca Raton, FL

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Larry Snyder

Andrea Snyder
Charlotte, NC

Ken Sparling

Ryann Sparling
San Jose, CA

Stan Specker

Julie Specker
Overland Park, KS

David Stark

New York, NY

Jason Stern

Jen Stern
Winston Salem, NC

Mark Strube

Tammy Strube
Allentown, PA

Jeffrey Strzelczyk

Hunt Valley, MD

Walter Stucker

Ronda Stucker
Fort Worth, TX

Jonathan Tanaka

Cynthia Tanaka
Pasadena, CA

Sarah Telljohann

Rich Telljohann, Jr.
Lutherville, MD

Wes Thomas

Laura Thomas
Raleigh, NC

Scott Thompson

Dallas, TX

Bart Timmerman

Rebecca Timmerman
Dubuque, IA

John Tran

Shelly Tran
Vancouver, WA

Allen Tsai

Eva Yen
Irvine, CA

Mark Tuller

Iessa Tuller
Alpharetta, GA

Josh VanderVeen

Kelli VanderVeen
Palm Beach, FL

Bruce Vaughn

Holley Vaughn
Milledgeville, GA

Bob Wacker

Brooke Hurst
Clayton, MO

John Wackowski

Eugenia Wackowski
Walnut Creek, CA

Greg Wade

Cheryl Wade
Alpharetta, GA

Aaron Waites

Kristina Waites
Irvine, CA

Jeffrey Walls

Kate Yoo
Seattle, WA

John Whelan

Darlene Whelan
Pittsburgh, PA

Mark Whitney

Julie Whitney
Manchester, NH

Bill Williams

Statesboro, GA

Jim Wiltman

Cassie Montell
Sewickley, PA

Melinda Woodell

Ju Woodell
San Diego, CA

Michael Woods

Kelsey Cerdas
Palo Alto, CA

Eric Worrell

Annie Worrell
Griffin, GA

Ryan Wyatt

Sarah Wyatt
Orlando, FL

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The Ritz-Carlton, Amelia Island
Advisors and Guests

Robin You

Kyle You
Walnut Creek, CA

Strat Zaferiou

Paul Zaferiou
Woodbury, NY

Firm Leadership

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

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

Britt Andros

Goldman Sachs Asset Management

Catherine Ardito

Goldman Sachs Asset Management

Olivia Bakunas

Nomura Asset Management

Oliver Brown

Nomura Asset Management
Amarna Milne

Travis Conlan

Hines

Luke D'Alessandro

Nomura Asset Management
Isabel Kuzy

Michelle Doyle

Federated Hermes
David Ausefski

Sam Frasco

First Trust Portfolios

Andy Goldberg

Nomura Asset Management

Blake Hood

Principal Asset Management

Greg Kanarian

Natixis Investment Managers

Brian Kelly

Capital Group Investments

Nick Kemerer

Federated Hermes

Robert Meyncke

Goldman Sachs Asset Management
Doreen Meyncke

Liam O'Brien

First Trust Portfolios

Ben Pagett

Natixis Investment Managers

David Polak

Capital Group Investments

Mike Reilley

First Trust Portfolios

Jacob Rodela

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Codi Smith

Natixis Investment Managers

Jason Topp

Principal asset management

JT Tousley

Goldman Sachs Asset Management

Robynn Vande Krol

Principal Asset Management

Dan Wroble

Federated Hermes