

# Kickoff Dinner Attendees

**Total : 97**

## Total Guests Attending: 81

Name	Work Phone	CFP#	Email Address
Amy Adamo			Spouse
Liz Agasar			Spouse
Ross L. Anderson	(949) 476-3712	254329	ross.anderson@ameriflex.com
Amanda Binswanger			Spouse
Michael Binswanger	(925) 949-5143		mbinswanger@financialguide.com
Anthony F. Blair	(602) 279-9818		anthonyblair@agrandar.com
Philip Bombace	(650) 286-5835		pbombace@financialguide.com
Eric W. Bond	(562) 285-0222		eric@bondwealthmgt.com
Jenny Breniff			Spouse
Cindy J. Bryant	(480) 237-5787		cindy.bryant@momentumfp.net
Sean M. Burr	(805) 497-9909		Sean@burrfinancial.com
Denise P. Carcel	(949) 833-5724		denise.carcel@axa-advisors.com
Paul A. Castagna	(415) 678-5269		paul.castagna@securitiesamerica.com
Suzette Chapman			Spouse
Scott A. Chelberg	(760) 603-0700	23043	chelberg@2rsi.com
Adam T. Ciepiela	(505) 884-0451		adam@charlesstephen.com
Jeannine R. Citoli	(425) 462-6335		jeannie@stickneyresearch.com
Ashley Davis			Spouse
Thomas W. Davis	(541) 342-2224		tj@finleydavis.com
Austin D. Dean	(425) 214-0403	260593	adean@pcrg.com
Kirk Dobson, Cfp, Chfc	(925) 277-2649		KDobson@dwassociates.com
Antonio Dominguez	(925) 659-0302		antonio.dominguez@lfg.com
Cynthia A. Doussard	(360) 755-0344		cynthia@doussardfinancial.com
Kelly Dukich			Spouse
Christine Emeterio			Spouse
Robert Emmer	(415) 383-6230	3869	remmer@silversageadvisors.com
Brett W. Fallon	(480) 237-5787		brett.fallon@momentumfp.net
Stephan P. Gabriel	(949) 204-3524		stephan@elektronfinancial.com
Vickie Garcia	(480) 990-9100	140933	Vickie@nextbridgewealth.com
Mary M. Gies	(509) 628-0569		mmgies@unitedplanners.com
Wayne Gilbert	(805) 565-4402		wgilbert@royalaa.com
John L. Grace	(805) 495-2077		jgrace@whybepoor.com
David K. Hansch	(949) 661-5225	026179	david@hanschfinancial.com
Laurie Hansch			Spouse
Walter J. Hansch	(858) 350-4350		john@hanschfinancial.com
Scott T. Harris	(602) 734-1157	115892	harris.scott@principal.com

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Charlie Haugh	(503) 382-8368		Chaugh@voyafa.com
David Henderson	(408) 978-6215		davidhenderson@financialguide.com
Chris Herkert	(360) 392-2842		cherkert@woodburyfinancial.net
Kk Herkert			Spouse
Morgan Herkert			Spouse
Patrick Herkert	(262) 375-0051		pherkert@woodburyfinancial.net
David R. Jernigan	(949) 247-3523		davidjernigan@cambridgefp.com
Douglas W. Jones	(949) 699-1660		Doug@JonesFinancial.com
Casey D. Kotter	(801) 993-0520	107211	casey@ifgteam.com
Gregory J. Krpalek	(541) 967-1888		krpalekg@wealthadvisorforlife.com
Sara Laclair	(480) 507-2425		sara@rayhonsfinancial.com
Lisa Lagorio	(925) 292-9638	28527	lisa.lagorio@securitiesamerica.com
Natalie Leininger	(510) 728-3578	20389	NATALIE@LEININGERFINANCIAL.COM
Christopher J. Lococo	(408) 899-4034		aic.chris@firstsia.com
John E. Lococo	(408) 899-2251		aic.jel@firstsia.com
Phillip E. Manning	(206) 384-5283		phil.manning@assetmark.com
Mark Markland	(310) 643-7737	55729	mark@marklandwealth.com
Shawn Mcelderry	(818) 370-9046		shawn.mcelderry@monarchwealth.com
Timothy F. Mcfall	(425) 576-1040		Tim@MyFinancialCompass.com
Dallas Mckinnon	(909) 363-4026	108763	Dallas.mckinnon@lfg.com
Daniel Medina	(805) 495-2077		dmedina@whybepoor.com
Rick Montejano	(818) 436-0254		rick@pacificpointam.com
Jeffrey Mramor	(818) 436-0296		jeff@pacificpointam.com
Bryan Nelson	(209) 668-9192	148042	bnelson@orionwealthinc.com
Maurice J. Nollette	(509) 279-0585		mnollette@lincolninvestment.com
Keith Offel	(714) 526-3777		Keith@stonehavenfinancialgroup.com
Barbara K. Orechoff	(805) 484-1011		Borechoff@sagepointadvisor.com
Monica Padilla	(925) 389-0223	26800	mpadilla-froning@aicrep.com
Mallory Potter			Spouse
Daintry N. Price	(425) 777-4673	4373	daintry@conovercapital.com
Christopher A. Riel	(925) 277-2683	300300	criel@dwassociates.com
Stanley B. Secor	(801) 521-0309		stan@pafinancialut.com
Rischi P. Sharma	(949) 209-8915	145666	rsharma@assemblypointe.com
Melissa Shaw-jones, Cfp	(949) 699-1660	2837	Melissa@JonesFinancial.com
Marli A. Smythe	(602) 200-5129		msmythe@cuefinancial.com
Marc Spiegel	(949) 347-1300	035963	mspiegel@fscadvisor.com
Cosette Tregeagle			Spouse
Tanner C. Tregeagle	(801) 993-0521		tanner@ifgteam.com
Christopher Brian. Vaccaro	(916) 467-8850		cvaccaro@capstonefinancial.net

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Kim Vaccaro			Spouse
Johnny Vallejo	(714) 526-3777		johnny@stonehavenfinancialgroup.com
Holly Wagner			Spouse
Matt Weaver	(510) 258-8838		matthew.weaver@fremontbank.com
Diane L. Woodward	(925) 275-9400	45679	diane@oaktreewealth.com
Eric Wygant			ewygant@thebancorp.com

# Kickoff Dinner Attendees

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## Total Clark Capital Employees Attending: 16

Name	Work Phone	CFP#	Email Address
Jim Agasar, Jr	2158012273		jagasar@ccmg.com
Brendan Clark, Cfa®	2155692224		bclark@ccmg.com
Sean Clark, Cfa®	215-569-2224		sclark@ccmg.com
Chris Cullen, Cima®	2155692224		ccullen@ccmg.com
Glenn S. Dorsey, Cfa®	215-569-2224		gdorsey@ccmg.com
Zack Dukich	(609) 703-3775		zackdukich@ccmg.com
Peter J. Eisenrich	215-569-2224		peisenrich@ccmg.com
Jon Fiebach	2155692224		jfiebach@ccmg.com
Thomas Finnegan	8005692224		tfinnegan@ccmg.com
Steven Grant	(215) 569-2224		grant@ccmg.com
Brett Mcavoy	(480) 370-2688		BMCAVOY@CCMG.COM
Jamie Mullen	215 817 7467		jmullen@ccmg.com
Len Oliveri	(215) 618-8134		Loliveri@ccmg.com
Anthony W. Soslow, Cfa®	215-569-2224		tsoslow@ccmg.com
Maira Thompson	800-766-2264		thompson@ccmg.com
Bridgette Weeks	(215) 618-8166		bweeks@ccmg.com