

Internal sales desk
800.991.8191

National accounts

Peter A. Tufts, Jr. CIMA® – Head of National Accounts, RIA, Bank Trust & Multi-Family Office
T: 857.350.8933 | C: 774.249.9405 | ptufts@vcm.com

Chris Felchlin, CFA – Sr. National Accts. Manager
415.761.0026 | cfelchlin@vcm.com

Toni Kresic – National Accounts
303.262.3551 | tkresic@vcm.com

Regional sales directors

■ **Laura Howard (AK, N. CA, HI, OR, WA, N. NV)**
415.994.1460 | lhoward@vcm.com
Sales Desk: 800.991.8191

■ **Garrett Kelley (S. CA, S. NV)**
310.748.5222 | gkelley@vcm.com
Sales Desk: 800.991.8191

■ **Jay Farley (AZ, CO, NM, UT)**
303.517.2003 | jfarley@vcm.com
Brian Groover | bgroover@vcm.com

■ **Gary Goska (NE, MN, WI)**
414.238.3956 | ggoska@vcm.com
Taylor Hopkins | thopkins@vcm.com

■ **Taylor Hopkins (ND, SD)**
440.223.6314 | thopkins@vcm.com

■ **Neil Pederson – UHNW (MT, CA, TX)**
303.902.3137 | npederson@vcm.com
Toni Kresic | tkresic@vcm.com

■ **Open (WY, ID)**
Sales Desk: 800.991.8191

Retail client support

Louise Vear and Keith Gritzek
Intermediary and Retirement
lvear@vcm.com | kgritzek@vcm.com

■ **Chance Beebe (MO, IA, KS.)**
314.780.2106 | cbeebe@vcm.com
Christian O'Connor | coconnor@vcm.com

■ **Carlos Chacon (IL, IN)**
773.807.8800 | cchacon@vcm.com
Jared Moleski | jmoleski@vcm.com

■ **Jim Fagan (MI, OH, W. PA)**
248.515.0237 | jfagan@vcm.com
Brian Groover | bgroover@vcm.com

■ **Joe Balestra (WV)**
312.718.0321 | jbalestra@vcm.com
Taylor Hopkins | thopkins@vcm.com

■ **Rich Davoli (NJ, NY, E. PA, DE, MD, DC, N.VA)**
215.375.6930 | rdavoli@vcm.com
Christian O'Connor | coconnor@vcm.com

■ **Joe Powers (NY – LONG ISLAND)**
516.238.4506 | jpowers@vcm.com
Ricky Aguilar | ragular@vcm.com

Sales desk managers

Jon Seymour and Toni Kresic
Intermediary and Retirement | 800.991.8191
js Seymour@vcm.com | tkresic@vcm.com

■ **Michael Howard (CT, MA, VT, NH, RI, ME, NY)**
617.774.8572 | mhoward@vcm.com
Trent Marshall | tmarshall@vcm.com

■ **Nick Peiffer (OK, TX)**
262.388.5301 | npeiffer@vcm.com
Ethan Fine | efine@vcm.com

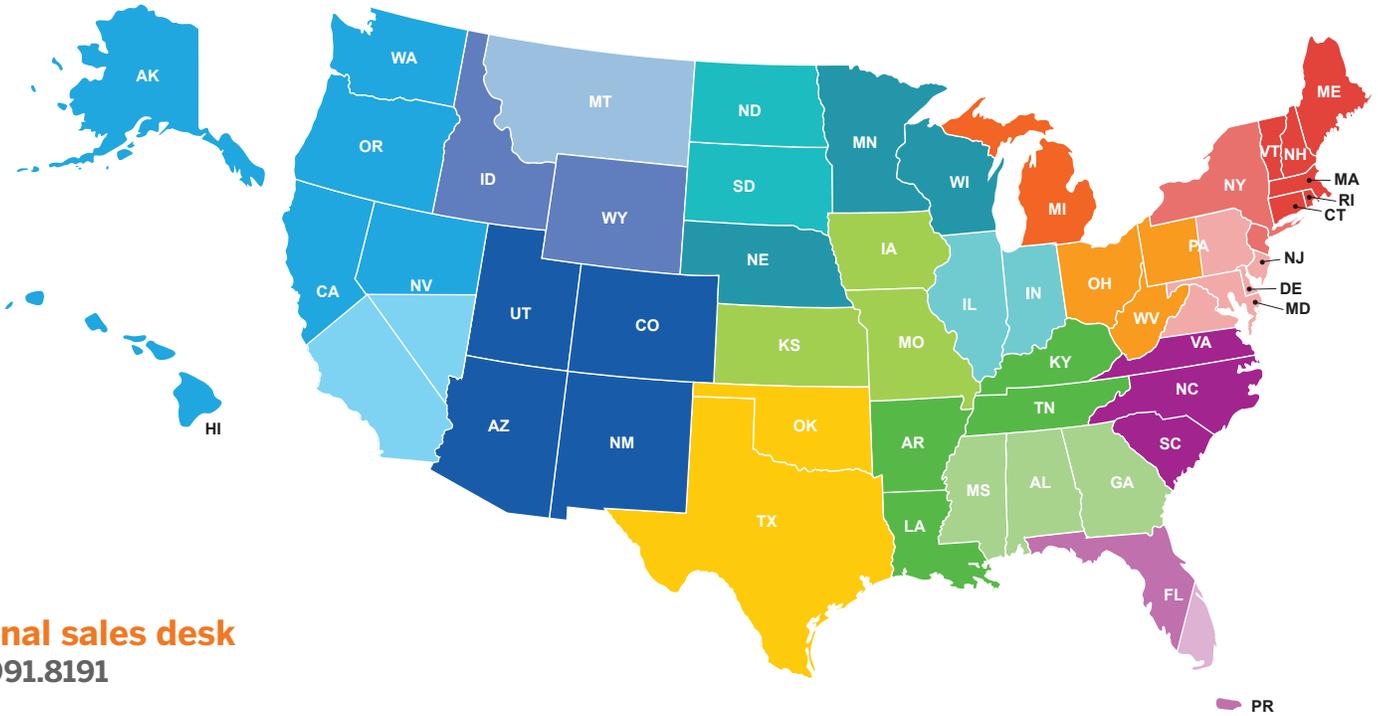
■ **Robbie Robinson (AL, GA, MS)**
256.527.1225 | rrobinson@vcm.com
Austin List | alist@vcm.com

■ **John Casconi (TN, KY, AR, LA)**
502.767.9427 | jcasconi@vcm.com
Ethan Fine | efine@vcm.com

■ **Jen Howard (W. FL, PR)**
727.412.0447 | jhoward@vcm.com
Ricky Aguilar | ragular@vcm.com

■ **Jason Muntner (E. FL)**
201.803.3934 | jmuntner@vcm.com
Ethan Fine (interim) | efine@vcm.com

■ **Gus Fennell (NC, SC, S. VA)**
843.718.6761 | gfennell@vcm.com
Austin List | alist@vcm.com



Internal sales desk
800.991.8191

National accounts

Peter A. Tufts, Jr. CIMA® – Head of National Accounts, RIA, Bank Trust & Multi-Family Office
T: 857.350.8933 | C: 774.249.9405 | ptufts@vcm.com

Chris Felchlin, CFA – Sr. National Accts. Manager
415.761.0026 | cfelchlin@vcm.com

Toni Kresic – National Accounts
303.262.3551 | tkresic@vcm.com

Regional sales directors

■ **Kurt Blanz (AK, N. CA, N. NV, OR, WA, HI)**
415.599.5588 | kblanz@vcm.com
Jared Moleski | jmoleski@vcm.com

■ **Garrett Kelley (S. CA, S. NV)**
310.748.5222 | gkelley@vcm.com
Sales Desk: 800.991.8191

■ **Jay Farley (AZ, NM, CO, UT)**
303.517.2003 | jfarley@vcm.com
Brian Groover | bgroover@vcm.com

■ **Nick Peiffer (TX, OK)**
262.388.5301 | npeiffer@vcm.com
Ethan Fine | efine@vcm.com

■ **Gary Goska (NE, MN, WI)**
414.238.3956 | ggoska@vcm.com
Taylor Hopkins | thopkins@vcm.com

■ **Taylor Hopkins (ND, SD)**
440.223.6314 | thopkins@vcm.com

■ **Neil Pederson – UHNW (CO, MT, CA, TX)**
303.902.3137 | npederson@vcm.com
Toni Kresic | tkresic@vcm.com

Retail client support

Louise Vear and Keith Gritzek
Intermediary and Retirement
lvear@vcm.com | kgritzek@vcm.com

■ **Open (WY, ID)**
Sales Desk: 800.991.8191

■ **Chance Beebe (MO, IA, KS)**
314.780.2106 | cbeebe@vcm.com
Christian O'Connor | coconnor@vcm.com

■ **Carlos Chacon (IN, IL)**
773.807.8800 | cchacon@vcm.com
Jared Moleski | jmoleski@vcm.com

■ **Jim Fagan (MI)**
248.515.0237 | jfagan@vcm.com
Brian Groover | bgroover@vcm.com

■ **Joe Geary (E. PA, S. NJ, DE, MD, DC, N. VA)**
610.742.6523 | jgeary@vcm.com
Trent Marshall | tmarshall@vcm.com

■ **Joe Powers (NY, N. NJ)**
516.238.4506 | jpowers@vcm.com
Ricky Aguilar | raguilar@vcm.com

■ **Drew Zinman (CT, MA, VT, NH, RI, ME)**
508.808.2700 | dzinman@vcm.com
Trent Marshall (interim) | tmarshall@vcm.com

Sales desk managers

Jon Seymour and Toni Kresic
Intermediary and Retirement | 800.991.8191
jseymour@vcm.com | tkresic@vcm.com

■ **John Casconi (KY, TN, AR, LA)**
502.767.9427 | jcasconi@vcm.com
Ethan Fine | efine@vcm.com

■ **Robbie Robinson (AL, MS, GA)**
256.527.1225 | rrobinson@vcm.com
Austin List | alist@vcm.com

■ **Joe Balestra (OH, W. PA, WV)**
312.718.0321 | jbalestra@vcm.com
Taylor Hopkins | thopkins@vcm.com

■ **Jen Howard (W. FL, PR)**
727.412.0447 | jhoward@vcm.com
Ricky Aguilar | raguilar@vcm.com

■ **Jason Muntner (E. FL)**
201.803.3934 | jmuntner@vcm.com
Ethan Fine (interim) | efine@vcm.com

■ **Gus Fennell (NC, SC, S. VA)**
843.718.6761 | gfennell@vcm.com
Austin List | alist@vcm.com

Retirement Solutions – National Accounts

Scott Neeb

Head of Retirement Division
800.991.8191 | sneeb@vcm.com

Tom Morrison, CIMA®, AIF®

National Accounts,
Retirement Solutions Group
303.262.3547 | tmorrison@vcm.com

Jon Seymour

Retirement Sales Desk Manager,
National Accounts
303.262.3542 | jseymour@vcm.com

Internal sales desk 800.991.8191

Retirement Divisional Managers

■ Neil Pederson

Central Division, Retirement Solutions Group
(AR, CO, IA, IL, IN, KS, LA, MI, MN, MO, MT, ND, NE,
OK, SD, TX, WI, WY)

303.902.3137 | npederson@vcm.com

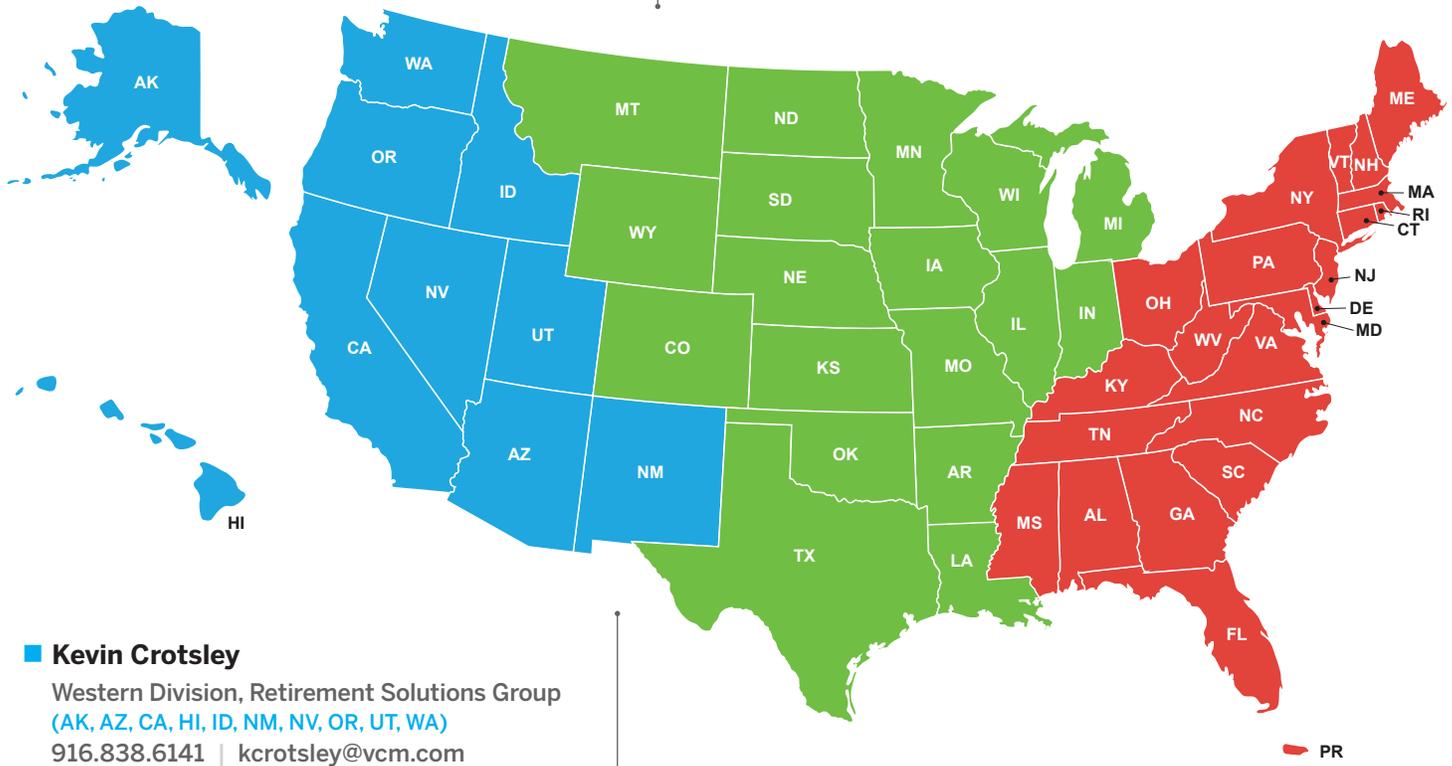
Toni Kresic | 303.262.3551 | tkresic@vcm.com

■ John Uricchio, CRPS®, iC(k)P®

Eastern Division, Retirement Solutions Group
(AL, CT, DC, DE, FL, GA, KY, MA, MD, ME, MS, NC, NH, NJ,
NY, OH, PA, PR, RI, SC, TN, VA, VT, WV)

860.662.2839 | juricchio@vcm.com

Jared Moleski | 303.262.3552 | jmoleski@vcm.com



■ Kevin Crotsley

Western Division, Retirement Solutions Group
(AK, AZ, CA, HI, ID, NM, NV, OR, UT, WA)

916.838.6141 | kcrotsley@vcm.com

Jared Moleski | jmoleski@vcm.com

National Accounts

Peter A. Tufts, Jr. CIMA®

Head of National Accounts, RIA,
Bank Trust & Multi-Family Office
T: 857.350.8933 | C: 774.249.9405 | ptufts@vcm.com

Chris Felchlin, CFA

Sr. National Accounts Manager
415.761.0026 | cfelchlin@vcm.com

Toni Kresic

Sales Desk Manager, National Accounts
303.262.3551 | tkresic@vcm.com

Internal sales desk

800.991.8191

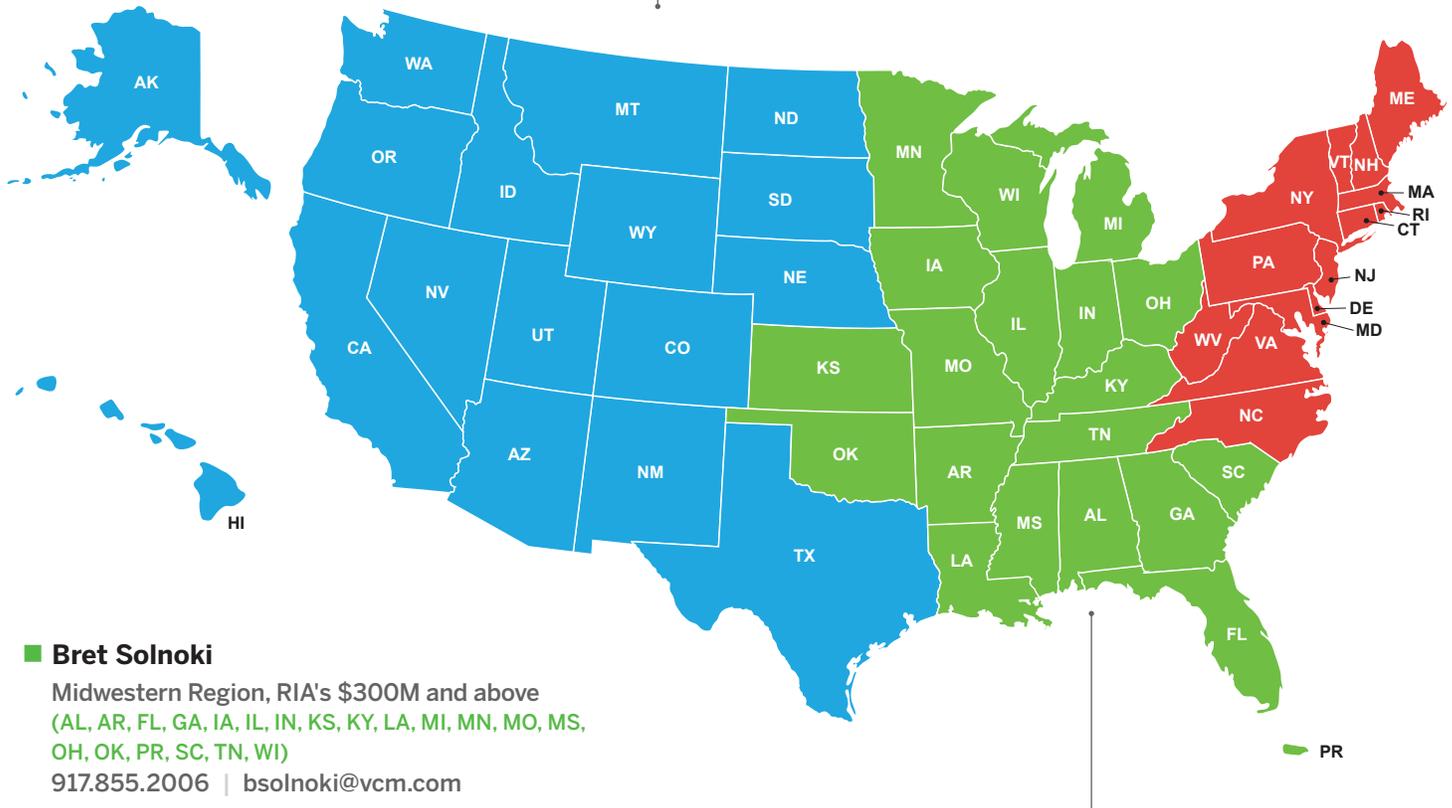
RIA's \$300M & above

■ Darren White

West Region, RIA's \$300M and above
(AK, AZ, CA, CO, HI, ID, MT, ND, NE, NM, NV, OR, SD,
TX, UT, WA, WY)
805.390.9005 | dwhite@vcm.com

■ Josh Gilbert

Eastern Region, RIA's \$300M and above
(CT, DC, DE, MA, MD, ME, NC, NH, NJ, NY, PA, RI,
VA, VT, WV)
857.350.8931 | joshua_gilbert@vcm.com



National Accounts

Peter A. Tufts, Jr. CIMA®

Head of National Accounts, RIA,
Bank Trust & Multi-Family Office
T: 857.350.8933 | C: 774.249.9405 | ptufts@vcm.com

Chris Felchlin, CFA

Sr. National Accounts Manager
415.761.0026 | cfelchlin@vcm.com

Toni Kresic

Sales Desk Manager, National Accounts
303.262.3551 | tkresic@vcm.com

Internal sales desk

800.991.8191

RIA's \$300M & below

■ Nate Haynes

West Region, RIA's \$300M and below
(AK, AR, AZ, CA, CO, HI, IA, ID, IL, IN, KS, LA, MN, MO, MT,
ND, NE, NM, NV, OK, OR, PR, SD, TX, UT, WA, WI, WY)
303.262.3566 | nhaynes@vcm.com

■ Paul LeBlanc

Eastern Region, RIA's \$300M and below
(AL, CT, DC, DE, FL, GA, KY, MA, MI, MD, ME, MS, NC, NH,
NJ, NY, OH, PA, RI, SC, TN, VA, VT, WV)
978.853.5640 | pleblanc@vcm.com

