## FSI Accounting & Finance Council



**Marshall Ollia** 

**Chief Financial Officer** 

Raymond James Financial Services, Inc.

St. Petersburg, FL



**Sunday Grace** 

**EVP, Chief Financial Officer** 

First Command Financial Services

Aledo, TX



Elizabeth Kozenko

Chief Financial Officer

Valmark Financial Group

Akron, OH



Josh Borkin

**Chief Financial Officer** 

Farmers Financial Solutions,

Westlake Village, CA



**Brian Beitzel** 

**Chief Financial Officer** 

Transamerica Financial
Advisors

Cedar Rapids, IA



Joe Faber

**Chief Financial Officer** 

Steward Partners Global Advisory

New York, NY



Jolene Gochenour

Controller

AE Wealth Management, LLC

Topeka, KS



Ryan Haarbrink

V.P., CFO

Wells Fargo Independent Advisors Group

Saint Louis, MO



**Don Much** 

Counsel, Retail Wealth Management

Lincoln Financial Network

Radnor, PA

## MEET the TEAM

## **FSI Accounting & Finance** Council



Mike O'Connor Chief Financial Officer CoastalOne Wilmington, DE



Ray Olson Chief Financial Officer

Centennial, CO



**Caryl Shepherd** Director, Finance Geneos Wealth Management, Transamerica/World Financial Group Johns Creek, GA



**Trisha Tymkiw** Head of Financial Planning & **Analysis** Atria Wealth Solutions, Inc. Syracuse, NY



**David Vaughan Chief Financial Officer** Sanctuary Wealth Group LLC Indianapolis, IN

## want to JOIN the TEAM?

Fill out an application and review our Council Guide for more information Deadline for applications is October 1, 2023