

# MEET *the* TEAM

## FSI Operations & Technology Council



### *Chair*

[Anthony Bueti](#)

Senior Vice President,  
Operations

Lincoln Investment  
Fort Washington, PA



### *Vice Chair*

[Charlotte Allen](#)

Director, Enterprise Risk  
Management

Commonwealth Financial  
Network  
Waltham, MA



### *Secretary*

[Larry Casey](#)

FVP – Information Systems, Chief  
Information Officer

Cambridge Investment Research,  
Inc.  
Fairfield, IA



### *Past Chair*

[Frank Smith](#)

SVP, Chief Information  
Security Officer and Data  
Privacy

First Command Financial  
Services, Inc.  
Fort Worth, TX



[Dean Bruno](#)

Chief Operating Officer  
American Portfolios Financial  
Services, Inc.  
Holbrook, NY



[Kristen Carmichael](#)

VP, Investment Controls  
Valmark Financial Group  
Akron, OH



[Brian Carter](#)

VP, Technology  
Axtella  
Ann Arbor, MI



[Jesse Dahl](#)

Operations Manager  
Cetera Investment Services  
Saint Cloud, MN



[Rob Gaudio](#)

Managing Director, Head of  
Operations  
Sanctuary Wealth Group LLC  
San Antonio, TX

# MEET *the* TEAM

## FSI Operations & Technology Council



[Leon Johnson](#)

Chief Information Security  
Officer

Atria Wealth Solutions, Inc.  
New York, NY



[Cody Lawler](#)

Head of Operations  
Principal Securities, Inc.  
Des Moines, IA



[Aeysha Murshedi](#)

Director of Operations  
Transamerica Financial  
Advisors, Inc.  
Duluth, GA



[Namita Patel](#)

VP, Client Experience  
Lincoln Financial Network  
Philadelphia, PA



[Amy Rehn](#)

SVP, RIA Custody Platform  
Osaic  
Norcross, GA



[Christopher Stief](#)

AVP, Broker Dealer Operations  
Lincoln Financial Network  
Philadelphia, PA



[Tarah Williams](#)

President, COO  
Prospera Financial Services  
Dallas, TX

*want to* **JOIN *the* TEAM?**

[Fill out an application](#) and review our  
[Council Guide](#) for more information

Deadline for applications is October 1, 2023