



**FINANCIAL
PLANNING
ASSOCIATION**

COLORADO

Partner Directory

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	Allianz Life 1 Brian Landwer brian.landwer@allianzlife.com 952-254-0836 http://www.allianzlife.com/riareadysolutions Allianz Life Insurance Company of North America (Allianz) commits dedicated resources and invests in helping independent advisors integrate risk management solutions, including annuities, as part of a comprehensive wealth management practice.
	ALPS Inc. 2 Darren Gaschler Darren.gaschler@sscinc.com 847-877-5278 www.alpsfunds.com/ SS&C ALPS Advisors is an open architecture boutique investment manager offering portfolio building blocks, active insight and an unwavering drive to guide clients to investment outcomes across sustainable income, thematic and alternative growth strategies.

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	ArrowMark Partners 3 Reed Babcock RBabcock@arrowmarkpartners.com 720-459-1301 www.arrowmarkpartners.com
	Capital Group 4 Rex Morgan Rex.Morgan@capgroup.com 970-371-7877 www.capitalgroup.com/ria/ Since 1931, Capital Group has been dedicated to improving people's lives through successful investing. Capital offers a range of products focused on active management, including mutual funds, SMA's, ETF's. In addition, we also offer market insights, client insights, wealth management and practice management.
	CCIG 5  Marr Mansfield marr.mansfield@thinkccig.com 720-330-7912 https://thinkccig.com CCIG is an independent insurance broker headquartered in Denver, Colorado. Founded in 1985 and recognized as one of the leading insurance brokerages in the U.S., CCIG provides property and casualty services to private and publicly traded businesses and high net-worth individuals and families. In addition, the CCIG team partners closely with wealth advisors to protect and preserve their clients' assets and long-term financial strategy.
	CollegeInvest 6 Brent Johnston bjohnston@collegeinvest.org 303-376-8837 https://www.collegeinvest.org/information-financial-advisors/ College savings made easy We're here to make it easier to save for your child's higher education with flexible, tax-advantaged 529 college savings plans, scholarships, and matching grants.

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	Colorado Gives Foundation 7 Jeremy Stern jstern@coloradogivesfoundation.org 720-898-5916 www.coloradogivesfoundation.org Colorado Gives Foundation connects people, ideas and nonprofits. We are a Jeffco grantmaker and statewide, we invest to build the capacity of nonprofits and donors through fundraising on Colorado Gives.org. We provide professional advisors with tools to enhance their clients' philanthropic impact such as Donor Advised Funds and Qualified Charitable Distributions.
	Dimensional Funds 8 Ian Moreau ian.morrow@dimensional.com 512-306-4605 www.dimensional.com/us-en/financial-professionals Since 1981, Dimensional has been applying financial science to investing—and supporting financial professionals with time-tested solutions to help grow their businesses. We offer a full range of tools, trainings, and resources – from investment solutions to client communication and business strategy – to help advisors build successful, client-focused practices.
	Fairway Independent Mortgage 9 Christine Jensen, CRMP cjensen@home.com 303-456-4403 (O) 720-232-0828 (C) christinereverse.com/ Given the misconceptions about reverse mortgages, Christine educates clients and industry professionals alike about the new guidelines and their improved safety features. Her purpose in utilizing reverse mortgages is to expand options for her clients as they approach their retirement years, and to help them increase their wealth by incorporating all assets at their disposal.

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 FIDELITY Charitable® <i>Make more of a difference</i>	Fidelity Charitable 10 Mario Villarreal Mario.Villarreal@fmr.com 817-474-6730 https://www.fidelitycharitable.org/
 forum	Forum Investment Group 11 Ben Low benlow@forumig.com 303- 501-8894 forumig.com
	GMBA Advisor Group 12  Garry Manchulenko Garrym@GMBAAdvisorsGroup.com 303-704-8842 https://gmbaadvisorsgroup.com/
	Longbridge Financial 13  Monica Elizondo melizondo@longbridge-financial.com 980-480-1371 https://longbridge-financial.com/
	Mainline West 14 Craig DiRuzzo cdiruzzo@mainlinewest.net 303-945-9850 mainlinewest.net

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	Meketa Capital 15 Tyler Bain tbain@meketacapital.com 303-514-9874 meketacapital.com Meketa Capital is an asset management firm focused on expanding access to private market investments to RIAs and other advisors, without the complexity of subscription documents, high investment minimums, and the complex tax treatment associated with traditional institutional private market investment
	Messner Reeves LLP 16  Kimberley Cronin kcronin@messner.com 303-534-9343 www.messner.com/ Messner Reeves is a national full-service business law firm providing legal services to a diverse group of clients. From individual entrepreneurs to Fortune 500 companies, no client is too big or too small. Regardless of size, industry or need, we earn our clients' trust by helping them maximize their business potential with creative, customized and comprehensive legal strategies.
	Segall, Bryant, & Hamill 17 Michael Spitz mspitz@sbhic.com 312-402-0569 https://www.sbhic.com/ Segall Bryant & Hamill SBH is a \$30bln Chicago-based asset manager with offices in Denver, St. Louis, Philadelphia, and New York. The firm serves the diverse needs of institutions and intermediaries, including brokerage firms, banks, TAMPS, and RIAs. It does so through a robust offering of fixed-income and domestic, international, and global equity strategies which are available in multiple vehicles.

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	Select Lending Services 18 Michele Beeson michele.beeson@selectlendingsservices.com 303-903-3214 https://www.michelebeeson.com/
SOCIAL SEED MARKETING <i>Digital Marketing for Financial Advisors</i>	Social Seed Marketing 19 Catherine Tidd catherine@socialseedmarketing.com 720-480-5042 www.SocialSeedMarketing.com Social Seed Marketing is a digital marketing company that specializes in email marketing, custom content, social media marketing, and strategic website copy for solo advisors and small financial planning practices. We help you grow your dream business by targeting your ideal client and creating compliance-approved marketing that differentiates you from everyone else.
	State Street Investment Management 20  Dylan Bassham Dylan_Bassham@ssga.com 480-255-4335 https://www.ssga.com/us/en/individual With a pioneering heritage rooted in indexing, and as the creator of many of the world's first ETFs, State Street Investment Management has a long track record of increasing access for investors through relentless innovation and cost-effectiveness. From core building blocks to tailored strategies, we offer a broad selection of solutions responsive to our client's needs. Whether you're an institution or an individual investor, you invest in a better future. Our job is to help you get there. It's what we've done since 1978, and why thousands of clients trust us to manage trillions of dollars in assets.

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	Transamerica 21  Marcie Carvalho marcie.carvalho@transamerica.com 303-941-5886 www.transamerica.com/ Our purpose is Helping People Live Their Best Lives. Helping clients achieve financial security as they live a longer more varied life. We're committed to providing the right tools to do just that. These include fee-only annuities, mutual funds, employee benefits, life insurance, and retirement solutions. Marcie is your dedicated Annuity Advisory Solutions consultant covering Colorado and the West, and she's excited to provide the right strategies.
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