



## RECRUITING & ONBOARDING



Executive VP

James Bonilla: jbonilla@mycoastalwealth.com | 954.513.4503



Managing Director - Market Leader

Michael Origlia: moriglia@mycoastalwealth.com | 561.779.0102 (*calls only*)



Chief of Staff

Susannah Willett: swillett@mycoastalwealth.com | 501.356.3989

## SALES & CONSULTING

*Help with book of business review, teaming, buying and selling of books*



EVP - (Executive VP South)

Roy Perez: royperez@financialguide.com | 786.460.3994



EVP - (Executive VP North)

Jason Heller: jasonheller@mycoastalwealth.com | 786.207.1732



VP of Consulting

Neil Weiss: NeilWeiss@mycoastalwealth.com | 561.559.5925



VP of Consulting

RJ Miles: rmiles@mycoastalwealth.com | 954.835.4959



Sales Consultant

Carlos Hernandez: chernandez@financialguide.com | 786.741.7958



Sales Consultant

Jim Winstel: jwinstel@financialguide.com | 602.962.4262



Sales Consultant

Andre Belle: abelle@mycoastalwealth.com | 561-351-9261



Sales Consultant

Jason Auricchio: jauricchio@financialguide.com | 786.751.4558

## BUSINESS DEVELOPMENT



VP of Business Development

Noah Kahn: nkahn@financialguide.com | 305.458.2490

## TECHNOLOGY



Head of Technology

Paul Cohen: PCohen@mycoastalwealth.com | 954.204.3311

*Items related to hardware and High Level Tech Issues*



PDS (Practice Development Specialist)

Michelle Brecher: MBrecher@mycoastalwealth.com | 954.231.3501

*Items related to A360, Outlook, Zoom and all other software programs*

## MMLIS/PLANNING SOLUTIONS GROUP



Investment Specialist

Reed Willett: rwillett@mycoastalwealth.com | 501.961.4233



Advanced Markets Manager

Nick Tranghese: NTranghese@mycoastalwealth.com | 413.666.1318



MMLIS Operations

Teresa Moulton: TMoulton@mycoastalwealth.com | 954.787.2338

## COASTAL FINANCE TEAM

*All things related to Mass Mutual and MMLIS compensation*



Director of Finance

Yaneli Hernandez: yhernandez@mycoastalwealth.com | 954.738.5168



Bookkeeper

Connie Douglas: CDouglas@mycoastalwealth.com | 954.787.2283

## COMPLIANCE

*All items pertaining to compliance.*



Head of Compliance

Claudia Spence: claudiaspence@mycoastalwealth.com | 954.204.0837



ASO (Agency Supervisory Officer)

Patricia Martinez: pmartinez@mycoastalwealth.com | 561.816.6761



ASO (Agency Supervisory Officer)

Kathy Shepard: kshepard@mycoastalwealth.com | 904.468.6207

## LICENSING

*All items pertaining to state licensing and FINRA registrations.*



Contracting & Licensing Director

Melissa Aguilar: maguilar@mycoastalwealth.com | 786.705.2317

## MARKETING



Chief Communications Officer  
Grace Staten: gstaten@mycoastalwealth.com | 954.710.9002  
*Agency Marketing Inquiries*



Marketing Director  
Brooke Kahn: bkahn@mycoastalwealth.com | 786.504.7625  
*Advisor Marketing Inquires*

## TRAINING & DEVELOPMENT



Director Training & Development  
Jason Falick: jfalick@mycoastalwealth.com | 954.998.0306



Training Coordinator  
Megan Ouellette: mharrison@mycoastalwealth.com | 954.994.1239

## NEW BUSINESS TEAM



New Business Team Lead  
John Valdes: JValdes@mycoastalwealth.com | 786.670.9246



New Business Specialist  
Sheila Rios: srios@mycoastalwealth.com | 786.692.8857



New Business Specialist  
Dallas Henninger | dhenninger@mycoastalwealth.com | 904.822.9819

## ARC (ADVISOR RESOURCE CENTER)



ARC Director  
Jen Lubieniecki: JLubieniecki@mycoastalwealth.com | 954.466.1143



ARC Coordinator  
Tammy Gazi: tgazi@mycoastalwealth.com | 954.637.7514

## MASS MUTUAL CONTACTS



Managing Director Worksite Benefits,  
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Life Regional Sales Director  
Denny McCarty: dmccarty@massmutual.com | 813.857.8364



Life Regional Product Specialist  
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