



RECRUITING & ONBOARDING



Executive VP

James Bonilla: jbonilla@mycoastalwealth.com | 954.513.4503



Managing Director - Market Leader

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Chief of Staff

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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



LTC & DI specialist

Michele Friedlander: mfriedlander@massmutualbrokerage.com | 954.689.9462

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)

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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
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Agency Marketing Inquiries



Marketing Director
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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
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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 Falcone: jfalcone@mycoastalwealth.com | 954.466.1143



ARC Coordinator
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MASS MUTUAL CONTACTS



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Life Regional Sales Director
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Life Regional Product Specialist
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