



RECRUITING & ONBOARDING



Executive VP

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Executive VP of Business Development

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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

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VP of Consulting

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Sales Consultant

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Sales Consultant

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Sales Consultant

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Sales Consultant

Jason Auricchio: jauricchio@financialguide.com | 786.751.4558

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

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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

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Bookkeeper

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COMPLIANCE

All items pertaining to compliance.



Head of Compliance

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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
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Agency Marketing Inquiries



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Advisor Marketing Inquires

TRAINING & DEVELOPMENT



Director Training & Development
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Training Coordinator
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NEW BUSINESS TEAM



New Business Team Lead
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New Business Specialist
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New Business Specialist
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ARC (ADVISOR RESOURCE CENTER)



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



ARC Coordinator
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MASS MUTUAL CONTACTS



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