



# THE IAA TEAM

**2018 DEPARTMENTS, MEMBERS AND ROLES**





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**Additional Teams:**

- Repapering Team
- Tech Support Team



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# THE EXECUTIVE TEAM

## ROBERT RUSSO

Chief Executive Officer



*ROBERT ESTABLISHED IAA TO HELP ADVISORS HARNESS THE SYNERGY THAT DRIVES PRACTICE GROWTH THROUGH SHARED RESOURCES, COLLECTIVE INTELLIGENCE, LOWER EXPENSES AND ACCESS TO BUSINESS CONSULTING RESOURCES. HE PROVIDES OVERSIGHT FOR THE ENTIRE FIRM.*

STRATEGIC PLANNING & DIRECTION OF FIRM  
OVERSIGHT OF IAA STAFF & PROGRAMS

## JESSICA SEXTON

Chief Compliance  
Officer



*JESSICA'S PRIMARY RESPONSIBILITIES ARE TO PROACTIVELY IDENTIFY, EVALUATE, MANAGE AND REPORT ON COMPLIANCE AND ENSURE IAA'S COMPLIANCE WITH OUTSIDE REGULATORY REQUIREMENTS AND INTERNAL POLICIES. SHE ALSO HANDLES HR SERVICES FOR THE FIRM.*

COMPLIANCE  
HR INQUIRIES

## JON REIDENOUER

Chief Operations  
Officer



*JON'S PRIMARY RESPONSIBILITIES INCLUDE RELATIONSHIP MANAGEMENT, BUSINESS CONSULTING/PRACTICE MANAGEMENT COACHING, SPECIAL PROJECT MANAGEMENT, AND OVERSEEING DAY-TO-DAY OPERATIONS OF THE FIRM.*

BUSINESS CONSULTING  
RELATIONSHIP MANAGER  
ISSUE RESOLUTION & ADVOCACY



# THE BUSINESS DEVELOPMENT TEAM

## MICHAEL GORDON

Managing Director  
Business Development



*MIKE'S PRIMARY RESPONSIBILITY IS TO FACILITATE IAA'S GROWTH BY IDENTIFYING QUALIFIED ADVISORS AND WEALTH MANAGEMENT TEAMS WHO CAN BENEFIT FROM THE TURNKEY INFRASTRUCTURE ALREADY IN PLACE AT IAA.*

RECRUITING  
REFERRALS  
ADVISOR PLACEMENT

## JORDAN O'DONNELL

Regional Director  
Business Development



*JORDAN'S PRIMARY RESPONSIBILITY IS WORKING WITH PROSPECTIVE CLIENTS TO EDUCATE AND CONSULT WITH THEM ON THE PLANNING, PROCESS AND REWARDS OF TRANSITIONING THEIR BUSINESS TO A PRIVATE PRACTICE MODEL WITH IAA.*

RECRUITING  
REFERRALS  
ADVISOR PLACEMENT

## DEANNA BOSKOVICH

Advisor Experience  
Director



*DEANNA'S [PRONOUNCED 'DINA'] PRIMARY RESPONSIBILITIES INCLUDE INTERNAL RECRUITING, BLACKBRIDGE FINANCIAL BRANDING AND RELATIONSHIP DEVELOPMENT, ADVISOR SERVICE AND TRAINING.*

RECRUITING ASSISTANCE  
ADVISOR SERVICE  
BLACKBRIDGE FINANCIAL  
CONVERSION INTAKE CALLS/PAPERWORK



# THE INVESTMENT SOLUTIONS TEAM

## CHRIS ZACCARELLI

Chief Investment  
Officer



*CHRIS' PRIMARY RESPONSIBILITIES ARE DIRECTING INVESTMENT POLICY AND RESEARCH, AND PORTFOLIO MANAGEMENT STRATEGIES. HE APPEARS REGULARLY ON CNBC AND IN SEVERAL PUBLICATIONS INCLUDING BLOOMBERG.*

PORTFOLIO MGMT STRATEGIES  
RESEARCH  
INVESTMENT POLICY

## CHRIS FALLIN

Compliance & Portfolio  
Analyst



*CHRIS' PRIMARY RESPONSIBILITIES INVOLVE THE OVERSIGHT AND MANAGEMENT OF IAA'S FIT SERIES PORTFOLIOS AND TRADING ON MULTIPLE PORTFOLIOS.*

FIT SERIES PORTFOLIO  
TRADING

## ROBERT RUSSO

Chief Executive Officer



*ROBERT PROVIDES OVERSIGHT TO THE INVESTMENT SOLUTIONS TEAM, DETERMINES INVESTMENT SOLUTION OPTIONS AND PRESENTS AVAILABLE OPTIONS TO ONBOARDING ADVISORS DURING THE ALLIANCE CALL SERIES.*

PROGRAM OVERSIGHT  
INSOURCED PORTFOLIO DISCUSSION



# THE COMPLIANCE TEAM

## JESSICA SEXTON

Chief Compliance  
Officer



*JESSICA'S PRIMARY RESPONSIBILITIES ARE TO PROACTIVELY IDENTIFY, EVALUATE, MANAGE AND REPORT ON COMPLIANCE AND ENSURE IAA'S COMPLIANCE WITH OUTSIDE REGULATORY REQUIREMENTS AND INTERNAL POLICIES.*

COMPLIANCE

## CHRIS FALLIN

Compliance & Portfolio  
Analyst



*AS A SERIES 24 LICENSED TEAM MEMBER, CHRIS PROVIDES COMPLIANCE SUPPORT AND BACK-UP TO JESSICA SEXTON.*

COMPLIANCE SUPPORT

## PAT RUSSO

Compliance Associate



*PAT'S PRIMARY RESPONSIBILITIES ARE TO PROCESS MONTHLY COMPLIANCE FILES, INCLUDING THE TRADE BLOTTER, AND REVIEW NEW ACCOUNT PAPERWORK ON A QUARTERLY BASIS TO CONFIRM COMPLIANCE WITH INDUSTRY REGULATIONS.*

MONTHLY COMPLIANCE FILES



# THE TRANSITIONS TEAM

## KENNY HALL

Onboarding & Compensation  
Manager



*KENNY'S PRIMARY RESPONSIBILITIES ARE TO GUIDE FINANCIAL ADVISORS AT OUTSIDE FIRMS THROUGH THEIR TRANSITION TO IAA AND LPL FINANCIAL, ASSIST ADVISORS WHO ARE GOING HYBRID WITH IAA WITH THEIR CONVERSION, AND ACT AS THE COMPENSATION MANAGER.*

TRANSITIONS / CONVERSIONS  
REPAPERING COACH  
COMPENSATION

## HOLLY CURTIS

Director of  
Communications



*HOLLY CONDUCTS THE INTAKE INTERVIEW FOR ALL ONBOARDING ADVISORS AND SUPPORT STAFF MEMBERS AND PREPARES THE REQUIRED IAA AND LPL ONBOARDING FORMS. FOR KENNY.*

TRANSITIONING AND NEW ADVISOR/STAFF  
INTAKE INTERVIEWS  
ONBOARDING FORM PREP  
IAA ESTABLISHMENT

## CHRIS FALLIN

Compliance & Portfolio  
Analyst



*CHRIS PROVIDES BACK-OFFICE REPAPERING MANAGEMENT AND SUPPORT.*

DATA UPLOAD  
REPAPERING SCHEDULE MANAGEMENT



# THE COMMUNICATIONS TEAM

## HOLLY CURTIS

Director of  
Communications



*HOLLY'S PRIMARY RESPONSIBILITIES INCLUDE COMMUNICATIONS AND MARKETING, WEBSITE DEVELOPMENT AND MAINTENANCE, EVENT PLANNING AND MANAGEMENT, ONBOARDING ASSISTANCE AND IAA ESTABLISHMENT. HOLLY PROVIDES OVERSIGHT TO THE ADVISOR SERVICE TEAM.*

COMMUNICATIONS  
WEBSITE DESIGN & MAINTENANCE / PORTAL  
EVENTS / CONFERENCE PLANNER

## DANA RYAN

Media Relations



*DANA'S PRIMARY RESPONSIBILITIES ARE MEDIA AND PUBLIC RELATIONS.*

IAA PUBLIC RELATIONS  
MEDIA RELATIONS





# THE ADVISOR SERVICE TEAM

## DEANNA BOSKOVICH

Advisor Experience  
Director



*DEANNA'S [PRONOUNCED 'DINA'] PRIMARY RESPONSIBILITIES INCLUDE INTERNAL RECRUITING, BLACKBRIDGE FINANCIAL BRANDING AND RELATIONSHIP DEVELOPMENT, ADVISOR SERVICE AND TRAINING.*

RECRUITING ASSISTANCE & EVENTS  
ADVISOR SERVICE  
BLACKBRIDGE FINANCIAL

## DIAMOND POLLARD

Advisor Service  
Associate



*DIAMOND'S PRIMARY RESPONSIBILITIES INCLUDE DAY-TO-DAY OFFICE ASSISTANCE, REPAPERING ASSISTANCE, THE VIRTUAL ADMIN PROGRAM, AND TECHNOLOGY TRAINING. SHE IS ALSO IAA'S SALESFORCE ADMINISTRATOR.*

TECH TRAINING  
VIRTUAL ADMIN COORDINATOR  
INTERNAL OFFICE ASSISTANCE

## TINA VONCANON

Advisor Service  
Associate



*TINA'S PRIMARY RESPONSIBILITIES INCLUDE ADVISOR/TEAM SERVICE, TRAINING, REPAPERING, VIRTUAL ADMIN ASSISTANCE, REDTAIL WORKFLOW DEVELOPMENT, AND INTERNAL SERVICE REQUESTS.*

ADVISOR/TEAM SERVICE  
REPAPERING & VIRTUAL ADMIN  
TRAINING  
NEW ADVISOR 'SERVICE & PREP' ALLIANCE CALL