



# THE IAA TEAM

FALL 2018 DEPARTMENTS, MEMBERS AND ROLES





FOUNDER & CHIEF EXECUTIVE OFFICER  
**ROBERT RUSSO**



CHIEF COMPLIANCE OFFICER  
**JESSICA SEXTON**



CHIEF OPERATIONS OFFICER  
**JON REIDENOUEUR**



CHIEF INVESTMENT OFFICER  
**CHRIS ZACCARELLI**

# Executive Leadership Team



CHIEF COMPLIANCE OFFICER  
**JESSICA SEXTON**



COMPLIANCE ANALYST  
**CHRIS FALLIN**



COMPLIANCE ANALYST  
**JEN DAVIS**



COMPLIANCE ASSOCIATE  
**PAT RUSSO**

# Compliance Team





CHIEF OPERATIONS OFFICER  
**JON REIDENOUE**



ADVISOR SERVICE ASSOCIATE  
**DIAMOND POLLARD**



ADVISOR SERVICE ASSOCIATE  
**JASON KOCEMBO**



FRONT OFFICE COORDINATOR  
**NICOLE GILEWICZ**

# Advisor Service Team





CHIEF OPERATIONS OFFICER  
**JON REIDENOUE**



TRANSITIONS &  
COMPENSATION MANAGER  
**KENNY HALL**



ADVISOR SERVICE ASSOCIATE  
**TINA VONCANON**



DIRECTOR OF STRATEGIC  
SOLUTIONS  
**STEVE GENSLER**

# Transitions & Advisor Service Team





FOUNDER & CHIEF EXECUTIVE OFFICER  
**ROBERT RUSSO**



MANAGING DIRECTOR OF  
BUSINESS DEVELOPMENT  
**MICHAEL GORDON**



REGIONAL DIRECTOR OF  
BUSINESS DEVELOPMENT  
**JORDAN O'DONNELL**



BUSINESS DEVELOPMENT  
COORDINATOR  
**DEANNA BOSKOVICH**

# Business Development Team



FOUNDER & CHIEF EXECUTIVE OFFICER  
**ROBERT RUSSO**



DIRECTOR OF  
COMMUNICATIONS  
**HOLLY CURTIS**

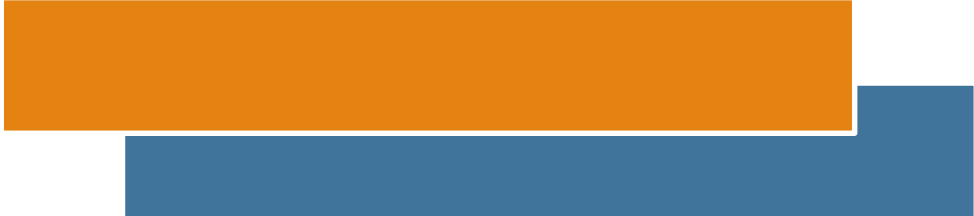


DIRECTOR OF MARKETING  
**SEAN BRENNAN**



MEDIA RELATIONS  
**DANA RYAN**

# Communications & Marketing Team



FOUNDER & CHIEF EXECUTIVE OFFICER  
**ROBERT RUSSO**



CHIEF INVESTMENT OFFICER  
**CHRIS ZACCARELLI**



PORTFOLIO ANALYST  
**CHRIS FALLIN**

# Investment Solutions Team







## DEPARTMENT RESPONSIBILITIES

### **Executive Leadership Team**

The executive leadership team is responsible for strategic planning and practice growth, oversight of the firm, programs and members, human resources, business consulting and advocacy.

### **Compliance Team**

The compliance team is responsible for proactively identifying, evaluating, managing and reporting on compliance and ensuring IAA's compliance with outside regulatory requirements and internal policies.

### **Advisor Service Team**

The advisor service team is responsible for providing day-to-day office assistance, providing P3 [Provisional Partner] assistance, advisor service and relationship development, technology training, and back-office transition/repapering assistance.

### **Business Development Team**

The business development team is responsible for finding prospective clients, educating and consulting with them on the planning, process and rewards of transitioning their business to a private practice model with IAA, and providing support throughout the process.

### **Transitions Team**

The transitions team is responsible for guiding financials advisors at LPL and outside firms through their transition to IAA, conducting intake calls to gather information and prepare advisor forms, conducting the Alliance call series for training and establishment, providing repapering management and support, and compensation services.

### **Investment Solutions Team**

The investment solutions team is responsible for directing investment policy and research, portfolio management strategies, oversight of IAA's portfolio options, and trading.

### **Communications & Marketing Team**

The communications and marketing team is responsible for internal and external communications, website development and maintenance, program introductions and campaign management, press releases and publications, advisor events including the annual conference, marketing and brand development.



## CONTACTING IAA TEAM MEMBERS

**We encourage you to call our main number, 855-403-1555 extension '0'.**

Doing so will connect you with  
**Nicole Gilewicz, our Front Office Coordinator.**

Nicole will know if team members are out of the office, in meetings, or on the phone. She can also determine who would be the best person to assist you with your inquiry.



## DIRECT DIALS AND EMAILS

|                  |  |                     |              |
|------------------|--|---------------------|--------------|
| Robert Russo     | <a href="mailto:rrosso@iaaria.com">rrosso@iaaria.com</a>           | 855-430-1555 x 7001 | 704-499-9702 |
| Jessica Sexton   | <a href="mailto:jsexton@iaaria.com">jsexton@iaaria.com</a>         | 855-430-1555 x 7002 | 980-318-5425 |
| Jon Reidenouer   | <a href="mailto:jreidenouer@iaaria.com">jreidenouer@iaaria.com</a> | 855-430-1555 x 7016 | 704-288-3302 |
| Chris Zaccarelli | <a href="mailto:czaccarelli@iaaria.com">czaccarelli@iaaria.com</a> | 855-430-1555 x 7013 | 704-237-3699 |
| Michael Gordon   | <a href="mailto:mgordon@iaaria.com">mgordon@iaaria.com</a>         | 855-430-1555 x 7008 | 704-251-7675 |
| Jordan O'Donnell | <a href="mailto:jodonnell@iaaria.com">jodonnell@iaaria.com</a>     | 855-430-1555 x 7009 | 781-291-9259 |
| Kenny Hall       | <a href="mailto:khall@iaaria.com">khall@iaaria.com</a>             | 855-430-1555 x 7004 | 704-499-9808 |
| Holly Curtis     | <a href="mailto:hcurtis@iaaria.com">hcurtis@iaaria.com</a>         | 855-430-1555 x 7003 | 704-499-9809 |
| Chris Fallin     | <a href="mailto:cfallin@iaaria.com">cfallin@iaaria.com</a>         | 855-430-1555 x 7005 | 704-323-8995 |
| Diamond Pollard  | <a href="mailto:dpollard@iaaria.com">dpollard@iaaria.com</a>       | 855-430-1555 x 7011 | 704-209-9885 |
| Deanna Boskovich | <a href="mailto:dboskovich@iaaria.com">dboskovich@iaaria.com</a>   | 855-430-1555 x 7012 | 704-288-5792 |
| Tina VonCanon    | <a href="mailto:tvovcanon@iaaria.com">tvovcanon@iaaria.com</a>     | 855-430-1555 x 7015 | 704-288-3304 |
| Pat Russo        | <a href="mailto:prusso@iaaria.com">prusso@iaaria.com</a>           | 855-430-1555 x 7006 | 704-243-9297 |
| Dana Ryan        | <a href="mailto:dryan@iaaria.com">dryan@iaaria.com</a>             | 855-430-1555 x 7014 |              |
| Jen Davis        | <a href="mailto:jdavis@iaaria.com">jdavis@iaaria.com</a>           | 855-430-1555 x 7010 | 704-230-1472 |
| Jason Kocembo    | <a href="mailto:jkocembo@iaaria.com">jkocembo@iaaria.com</a>       | 855-430-1555 x 7018 | 704-243-5687 |
| Steve Gensler    | Start date approaching   |                     |              |
| Sean Brennan     | Start date approaching   |                     |              |