



HoyleCohen
Wealth Management

Yearbook

Class of



2021



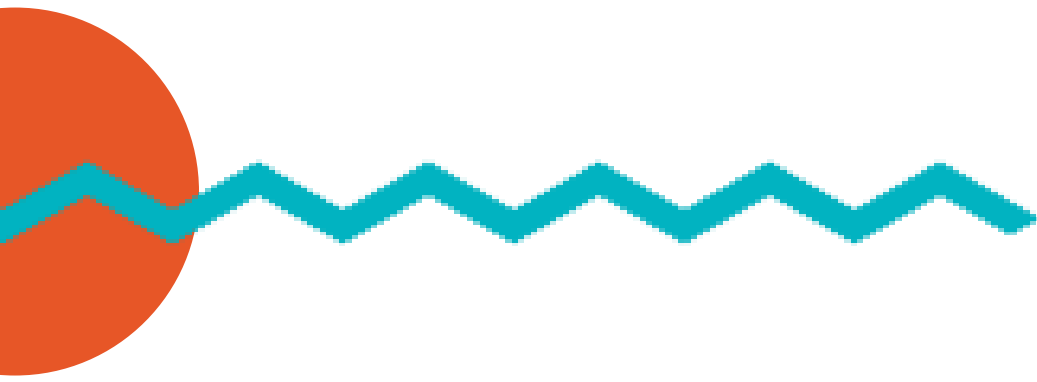


Michelle Spagnola **Project Manager** **Remote from Denver**

Michelle Branchini is a **Project Manager** focusing on human resources, finance, and marketing. Michelle will be fully remote from Denver, Colorado.

Some of you may already know Michelle from her work with CFA Society San Diego where she has worked as their Managing Director running all chapter operations for the last seven years. Previously, she worked at Allianz in their downtown San Diego office. Michelle has a BS in Business Administration from Florida International University.

In her spare time, Michelle enjoys snowboarding with her husband (newlyweds in 2021), graphic design, and spending time with her two dogs.



Jesica Jackson is a **Portfolio Administrator** for the San Diego office. Jesica has 10+ years of investment experience, working the past 7 years as a Portfolio Administrator for Avalon Advisors in Houston. She graduated with a Bachelor's Degree in Finance from the University of Houston.

In her role, she reports directly to Laurie Shandley, Investment Operations Manager, and is responsible for maintaining client accounts through cash management and rebalancing, trade execution, and global systems maintenance.

In her spare time, Jesica enjoys biking, gardening, cooking with her husband (newlyweds in 2020), and caring for her two long hair Dachshunds.

Jesica Jackson **Portfolio Administrator** **Remote from Houston**





Bob Carnegie, CFA, CFP®

Senior Wealth Advisor

Phoenix Office

Bob Carnegie is a **Senior Wealth Advisor** in the Phoenix office. Bob has 15+ years of experience in the investment industry, most recently as a Senior Portfolio Manager at Huntington National Bank. He graduated in 2007 with a BS in Finance from Penn State University.

In his new role, he reports directly to Jeremy Kovacevic, while working closing with Steve Taddie and his advisory clients.

Bob is a board member of the Pittsburgh Botanic Garden, a member of the Pittsburgh CFA Society, and a recent graduate of the Pittsburgh Leadership Development Initiative. He enjoys visiting our treasured national parks and is excited about relocating closer to so many of the great parks in the western US!

Sofia Khan serves as a **Relationship Manager** bringing with her 10+ years of financial services experience, most recently at Simplicity Scottsdale.

In her role, Sofia is responsible for supporting our clients through answering inquiries, preparing communications, forms, and packages, managing paperwork and data, coordinating meetings, and facilitating financial transactions. She is also instrumental in supporting several of the Wealth Managers and Portfolio Managers in developing their business and fine tuning their messaging and offerings.

In her spare time, Sofia enjoys taking road trips, with a bucket list goal of visiting all U.S. national parks. She also enjoys camping, hiking, kayaking, and horseback riding.

Sofia Khan

Relationship Manager

Phoenix Office





Chase Campbell, CFP®

Associate Wealth Advisor

Santa Monica Office

Chase Campbell serves as an **Associate Wealth Advisor** at HoyleCohen, bringing with him 5+ years of financial services experience. He graduated with a Bachelor's Degree from California State University, Northridge, went on to earn his CFP designation from NYU, and is currently an active member of the Financial Planning Association.

In his role, Chase is responsible for working closely with clients to help them achieve their financial goals, following high standards of business and professional ethics, as well as legal and regulatory requirements. He works with the team's senior advisors to develop sound client-centric strategies, foster a unique client experience, and find and cultivate new prospects. His drive and commitment to upholding ethics and engaging in professional development make him an outstanding member of the HoyleCohen team.

In his spare time, Chase enjoys all outdoor activities, particularly hiking, golfing, snowboarding, and riding his motorcycle. He's also an avid skydiver and a member of the United States Parachute Association.

Kelly Heath serves as a **Senior Relationship Manager** at HoyleCohen, bringing with her 8+ years of financial services experience, most notably at JP Morgan Securities.

In her role, Kelly is responsible for supporting Peter Mueller, Kathy Siriwan, and their advisory clients. She serves as their clients' point of contact, championing the client relationship by responding to client inquiries, managing client communications, paperwork and data, coordinating client meetings, and facilitating financial transactions. Her attention to detail, technical experience, and commitment to ensuring stellar client satisfaction make her an exceptional member of the HoyleCohen team.

In her spare time, Kelly enjoys going to the beach, traveling, cooking, and running. Additionally, she serves as an active volunteer for *A Place Called Home*, a nonprofit that provides a safe, nurturing environment with proven programs in arts, education and wellness for the young people in South Central Los Angeles with the central goal of helping them improve their economic conditions and develop fulfilling lives.

Kelly Heath

Senior Relationship Manager

Santa Monica Office





Alex Garofalo

Senior Relationship Manager

Santa Monica Office

Alex Garofalo serves as a **Senior Relationship Manager** at HoyleCohen, bringing with him 9+ years of financial services experience, most recently at Wells Fargo Advisors.

In his role, Alex is responsible for supporting Kathy Siriwan and her advisory clients, acting as her primary Relationship Manager. Alex will serve as the clients' point of contact, championing the client relationship by responding to client inquiries, managing client communications, paperwork and data, coordinating client meetings, and facilitating financial transactions. His tenacity, outstanding interpersonal skills, and attention to detail make him an exceptional member of the HoyleCohen team.

In his spare time, Alex enjoys reading, listening to music, and playing the drums (he was a major label executive in his first career). He also enjoys volunteering for a local animal rescue.



Samantha Del Campo is the **Front Office Coordinator** in the San Diego office. She graduated from San Diego State University in 2020 with a BS in Business Management.

In her new role, Samantha reports directly to our Engagement and Compliance Manager and is responsible for performing administrative duties and all front office functions, with the goal of providing a lasting first impression to incoming guests.

In her spare time, Samantha enjoys playing indoor soccer (and any other sporting activity) and recording music! She has been singing since she was a child and enjoys writing her own R&B/Pop music.

Sam Del Campo

Front Office Coordinator

San Diego Office





Michelle Tran

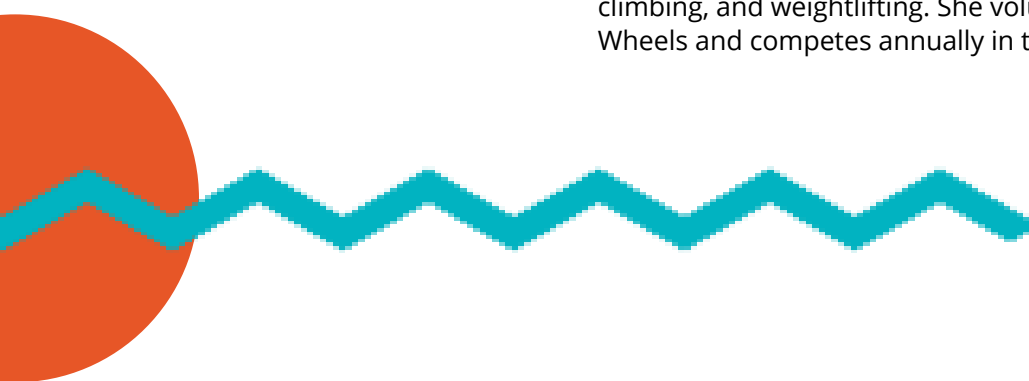
Relationship Manager

San Diego Office

Michelle Tran is a **Relationship Manager** in the San Diego office. Michelle has five years of experience in the investment industry, most recently as an Investment Operations Specialist at Chandler Asset Management. She graduated in 2016 with a BA in Communication from UCSD.

In her new role, she reports directly to the Client Services Manager, while also supporting Elisabeth Cullington and her advisory clients.

In her spare time, Michelle enjoys cooking and baking, traveling, indoor rock climbing, and weightlifting. She volunteered for 6 months with Meals on Wheels and competes annually in the Chinatown Firecracker 10K.



Will Caisido serves as Salesforce Administrator at HoyleCohen, bringing with him 5+ years of Salesforce Development and Design experience, most recently at Axos Bank.

In his role, Will is responsible for guiding digital transformation by bridging the gap between business & technology through Hoyle Cohen's Salesforce platform. As Salesforce project lead, Will works closely with key stakeholders to understand business needs, architects scalable software systems, automates complex business processes, building testing and auditing the right product features to maximize business value, provides valuable insights by visualizing data in Reports and Dashboards, manages integrations between other software systems and Salesforce and maintains comprehensive and relevant documentation of all Salesforce Processes.

In his spare time, Will enjoys the challenge of training Brazilian Jiu jitsu and Muay Thai Boxing. He also enjoys finding balance through beach yoga and paddle boarding at La Jolla shores and Mission Bay and always learning more about the Salesforce platform.

Will Caisido

Salesforce Administrator

San Diego Office





Leslie Hodgson

Senior Relationship Manager

San Diego Office

Leslie Hodgson joined HoyleCohen's San Diego office in February of 2021, bringing with her 25+ years of financial services experience with a focus on client service and account management. Leslie operates in numerous capacities for the firm. As Executive Assistant to CEO, Mark Delfino, she is responsible for project and schedule management, as well as business development support. As Relationship Manager, Leslie interfaces regularly with clients, managing paperwork flow and cultivating the client relationship in a myriad of ways.

Leslie holds a bachelor's degree from the University of Colorado, Boulder, and has extensive experience in operations at an independent RIA.

Born and raised in La Jolla, CA, Leslie enjoys spending time with her family, reading, walking and bike riding. She also actively volunteers in the San Diego community by contributing her time to Rady Children's Hospital, beach clean-ups, equestrian therapy, and women's shelters.



April Schultz is an **Associate Financial Planner** in the San Diego office. April began part-time, as she finished her final semester at San Diego State University completing a BS in Business Administration and Financial Services with a Certificate in Personal Financial Planning and a minor in Biology.

April reports to our Financial Planning Manager, Jack O'Donnell, providing financial planning support to both internal and external customers, including clients, advisors, client service personnel.

April Schultz

Associate Financial Planner

San Diego Office





Vanessa Gafencu **Sr. Client Operations Associate** **San Diego Office**

As **Senior Client Operations Associate**, Vanessa is responsible for ensuring a smooth flow of communications and processes between our Advisory Teams, Fund Managers, Custodians, and Client Services Teams. She is fundamental in creating and managing multiple processes and projects related to investment maintenance, document flow/signing, internal systems maintenance, and our custodial relationships.

Vanessa has 7+ years of project management experience, working the last four years at Spinnaker investment Group in Orange County, CA. She holds a bachelor's degree in Fine Arts from the University of San Diego (USD).

In addition to having lived in Paris, France and Perugia, Italy, she has lived in several areas of Southern California, including San Diego where she lives currently. In her spare time, Vanessa enjoys traveling, skiing, listening to music, and mountain biking.



As **Senior Manager of People & Culture**, **Stacy Love** oversees all aspects of the firm's Human Resources, including employee relations, talent acquisition, training and development, liaising with other departments on internal communications, and compliance with state and federal employment laws. She plays a vital role in strategizing with and supporting the executive team as they navigate the many organizational changes and decisions that come with a growing firm.

Stacy's background includes 20+ years of experience in the financial industry, 15+ years in progressive human resources management, and 10+ years as Executive Director of CFA Society San Diego.

Stacy holds a bachelor's degree in Business Administration from California State University, San Marcos, an MA in Organizational Leadership, an Executive Certificate in Public and Nonprofit Leadership from Brandman University, and a host of other designations.

In addition to an unquenchable thirst for learning, Stacy enjoys international travel, baking, and graphic design. She lives in Bloomington, Indiana with her husband and two dogs.

Stacy Love, SPHR[®], PHRca[®] **Sr. Mgr., People & Culture** **San Diego Office**





Laurie Shandley

Investment Operations Manager

San Diego Office

As **Investment Operations Manager** for HoyleCohen, **Laurie Shandley** plays an integral role in supporting centralized trading and portfolio management, working diligently to improve efficiencies and provide additional leverage to the Advisory teams. She is responsible for several portfolio-related tasks, including cash management, rebalancing and trade execution, capital calls, journals and distributions, and proceeds redeployment. Additionally, Laurie assists with system design and trading software management to ensure optimal efficiency.

Laurie joined the team in 2020 with 25+ years of experience in the finance industry, including 19 years at Brandes Investment Partners, a local investment advisory firm managing global equity and fixed income assets. While at Brandes, she began as an Analyst in the SMA/Wrap department, later transitioning to a Senior Account Analyst role, and eventually becoming a Trading and Operational Risk Specialist. She holds a bachelor's degree in Psychology from UCLA.

Laurie enjoys going to the beach, hiking, practicing yoga, and dining at some of her favorite local restaurants. She also enjoys reading and traveling with her family.



Shawn joined HoyleCohen in 2021 as the IT & Security Manager, bringing with him extensive experience in the technology space. In this role, Shawn reports directly to the Director of Systems & Integration and is responsible for managing the firm's Information Technology and Security functions. He works diligently to analyze IT workflows and security operations to identify risks, develop plans to safeguard the firm from accidental or unauthorized breaches to security, implement new systems, build standardized operating procedures, and communicate status, needs, and potential issues to the Technology Team.

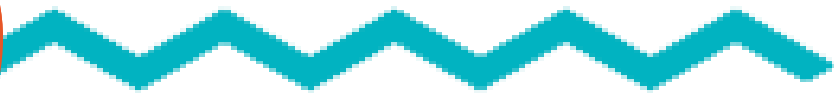
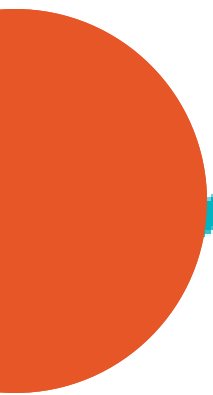
Shawn graduated from the University of Redlands with a Master's degree in Business Administration, and a second Master's degree in Organizational Leadership. In his personal life, he enjoys working on his car and taking countryside drives. A true car enthusiast, he has been differentiating car models and brands before he could talk! Technology is also a genuine passion of his. He recalls his Dad intentionally breaking the family computer so that Shawn could troubleshoot how to fix it.

Shawn Pourhousseini, MBA

IT & Security Manager

San Diego Office





WELCOME
Class of 2021!