



Welcome to Coastal Resources Onboarding Guide

A Comprehensive Guide to Your Success



[Click to Get Started.](#)



A Warm Welcome to Coastal Wealth



Hear from our leadership about Coastal Resources' mission and how we support your success.



Harris Fishman,
CLU, ChFC
Chairman



Jeremy M. Straub,
CRPC, CFS®
CEO



Luis Hernandez
Partner

Your Key Contacts at Coastal Resources

Find the right people to support you as you get started.

South Region



Leads our recruiting team in recruiting new advisors and is a resource in development

Name: James Bonilla

Title: Executive Vice President

Email: jbonilla@mycoastalwealth.com

Phone: 954-465-6558



Assists with leading our recruiting efforts in South Florida

Name: Michael Origlia

Title: Market Leader

Email: moriglia@mycoastalwealth.com

Phone: 561-779-0102



Assists recruiting team with strategic initiatives and leads the on boarding process in South Florida

Name: Susannah Willett

Title: Chief of Staff, South Region

Email: swillett@mycoastalwealth.com

Phone: 501-356-3989

Your Key Contacts at Coastal Resources

Find the right people to support you as you get started.

North Region



Leads our recruiting team in recruiting new advisors and is a resource in development

Name: Roger Dominey

Title: Executive Vice President

Email: rdominey@mycoastalwealth.com

Phone: 904-867-7249



Assists with leading our recruiting efforts in North Florida

Name: Kristin Abrams

Title: Chief of Staff, North Region

Email: kabrams@mycoastalwealth.com

Phone: 904-867-8282

Sales Team

Help with book of business review, teaming, buying and selling of books.



Executive VP South

 **Roy Perez**

 royperez@financialguide.com

 786-460-3994



Executive VP North

 **Jason Heller**

 jasonheller@mycoastalwealth.com

 786-207-1732

Welcome Video 


Inexperienced Producers: Agent Development Team



Regional Development Manager

 **Elliot Barry**

 elliotbarry@financialguide.com


 610-590-7811



VP Business Development

 **Regional Development Manager**

 nkahn@mycoastalwealth.com


 (305) 458-2490



Agent Development Specialist

 **Kathy Martinez**

 kmartinez@mycoastalwealth.com

 954-689-9559

Welcome Video 

Your Partner in Success: Advisor Resource Center


ARC provides practice growth and management offering business resource bundles and personalized practice assistance



Head of ARC

 **Jennifer Falcone**

 jfalcone@mycoastalwealth.com


 954-466-1143



ARC Coordinator

 **Tammy Gazi**

 tgazi@mycoastalwealth.com

 954-637-7514

Welcome Video 


New Business: Streamlining Success from Start to Finish



VP of Underwriting and New Business

 **Suzanne Grover**

 sgrover@mycoastalwealth.com


 737-367-2787



Head of MMLIS Operations

 **Sue Steiger**

 ssteiger@mycoastalwealth.com


 954-280-2806



MMLIS New Business Specialist

 **Teresa Moulton**

 tmoulton@mycoastalwealth.com


 954-331-5080



LAD New Business Team Lead

 **John Valdes**

 jvaldes@mycoastalwealth.com

 305-503-4141

Welcome Video 


Finance Department: Driving Efficiency & Accountability



Head of Finance

 **Yaneli Hernandez**

 yhernandez@mycoastalwealth.com

 954-738-5168

Welcome Video 

Ensuring Compliance, Protecting Integrity


The Compliance Team ensures that all regulatory requirements are met. They provide support for licensing, FINRA registrations, and adherence to company policies.



Head of Compliance

 **Claudia Spence**

 claudiaspence@mycoastalwealth.com


 954-204-0837



ASO (Agency Supervisory Officer)- South

 **Patricia Martinez**

 pmartinez@mycoastalwealth.com


 561-816-6761



ASO (Agency Supervisory Officer)- North

 **Kathy Shepard**

 kshepard@mycoastalwealth.com

 904-468-6207

Welcome Video 

Your IT Support Team


The IT team can assist with hardware and high-level technology issues, as well as support for A360, Outlook, Zoom, and all other software programs.



Head of Technology

 **Paul Cohen**

 ASKIT@coastalwealth.freshservice.com


 954-204-3311



PDS (Practice Development Specialist)

 **Michelle Brecher**

 MBrecher@mycoastalwealth.com

 954-231-3501

Welcome Video 

Training for Success


Our training programs are designed to set you up for success. Explore introductory (IXP) and advanced (EXP) programs, and test-out opportunities.



Director of Training & Development

 **Jason Falick**

 jfalick@mycoastalwealth.com

 954-998-0306

Welcome Video 

Strategic Planning, Simplified


PSG provides advanced market support, investment specialization, and tools to help advisors grow their practices.



Investment Specialist

 **Reed Willett**

 rwillett@mycoastalwealth.com

 501-961-4233



Advanced Markets Manager

 **Nick Tranghese**

 ntranghese@mycoastalwealth.com

 413-666-1318

Welcome Video 

Your Financial Planning Team


Our Financial Planning team is here to help advisors and clients achieve their goals through strategic planning and personalized solutions.



Head of Financial Planning

 **Sam Eppy**

 seppy@mycoastalwealth.com

 954-287-1806

Welcome Video 

Your Marketing Partners


Agency and advisor marketing at Coastal Resources includes broad promotional initiatives and personalized support for advisor branding and materials.



Chief Communications Officer

 **Grace Staten**

 gstaten@mycoastalwealth.com


 954-710-9002



Marketing Director

 **Brooke Kahn**

 bkahn@mycoastalwealth.com

 786-504-7625

Welcome Video 


Home Office Contacts

Life Insurance

Life Regional Sales Director

 **Denny McCarty**


 dmccarty@massmutual.com

 813-857-8364

Life Sales Consultant

 **Gavin Cheyney**

 Gcheyney39@massmutual.com


 413-744-6973

Annuity

Annuity Regional Sales Director

 **Dan Santos**


 dsantos@massmutual.com

 413-519-0991

Annuity Sales Consultant

 **Jay Mazur**


 Jmazur16@massmutual.com

 413-744-6928

Annuity Sales Consultant

 **Kenny Herrera**

 kherrera@massmutual.com


 602-533-3505

Disability Income

DI Regional Sales Director

 **Andrew Stone**


 Astone14@massmutual.com

 980-233-1024

DI Sales Consultant

 **Dave Burke**

 dburke@massmutual.com

 413-744-6958

Main sales desk number:
1-800-767-1000 x25000

Thank you

for joining the Coastal Wealth team. We're here to support you every step of the way as you grow and succeed with us!

COASTAL
WEALTH

www.mycoastalwealth.com

