



# 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 onboarding 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](mailto:jfalcone@mycoastalwealth.com)

 954-466-1143



## ARC Coordinator

 Tammy Gazi

 [tgazi@mycoastalwealth.com](mailto: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](mailto:sgrover@mycoastalwealth.com)

 737-367-2787



## Head of MMLIS Operations

 Sue Steiger

 [ssteiger@mycoastalwealth.com](mailto:ssteiger@mycoastalwealth.com)

 954-280-2806



## MMLIS New Business Specialist

 Teresa Moulton

 [tmoulton@mycoastalwealth.com](mailto:tmoulton@mycoastalwealth.com)

 954-331-5080



## LAD New Business Team Lead

 John Valdes

 [jvaldes@mycoastalwealth.com](mailto:jvaldes@mycoastalwealth.com)

 305-503-4141

Welcome Video 

## Finance Department: Driving Efficiency & Accountability



### Head of Finance

 **Yaneli Hernandez**

 [yhernandez@mycoastalwealth.com](mailto: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](mailto:claudiaspence@mycoastalwealth.com)

 954-204-0837



### ASO (Agency Supervisory Officer)- South

 **Patricia Martinez**

 [pmartinez@mycoastalwealth.com](mailto:pmartinez@mycoastalwealth.com)

 561-816-6761



### ASO (Agency Supervisory Officer)- North

 **Kathy Shepard**

 [kshepard@mycoastalwealth.com](mailto: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](mailto:ASKIT@coastalwealth.freshservice.com)

 954-204-3311



### PDS (Practice Development Specialist)

 **Michelle Brecher**

 [MBrecher@mycoastalwealth.com](mailto: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](mailto: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](mailto:rwillett@mycoastalwealth.com)

 501-961-4233



**Advanced Markets Manager**

 **Nick Tranghese**

 [ntranghese@mycoastalwealth.com](mailto: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](mailto: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](mailto:gstaten@mycoastalwealth.com)

 954-710-9002



## Marketing Director

 **Brooke Kahn**

 [bkahn@mycoastalwealth.com](mailto: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](http://www.mycoastalwealth.com)

