

Welcome to Coastal Resources Onboarding Guide

A Comprehensive Guide to Your Success



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 recruting team in recruting 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 recruting efforts in South Florida

Name: Michael Origlia

Title: Market Leader

Email: moriglia@mycoastalwealth.com

Phone: 561-779-0102



Assists recruting 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 recruting team in recruting 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 recruting 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

x royperez@financialguide.com

786-460-3994



Executive VP North Jason Heller

L 786-207-1732

Welcome Video 🕞

Inexperienced Producers: Agent Development Team



Regional Development Manager

Elliot Barry

elliotbarry@financialguide.com

L 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 menagement offering business resource bundles and personalized practice assistance



Head of ARC

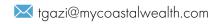
Jennifer Falcone

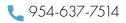


Q 954-466-1143



ARC Coordinator
Tammy Gazi







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

xsteiger@mycoastalwealth.com

954-280-2806



MMLIS New Business Specialist

Teresa Moulton

tmoulton@mycoastalwealth.com

**** 954-331-5080



LAD New Business Team Lead

John Valdes

ivaldes@mycoastalwealth.com

 ivaldes@mycoastalwealth.com

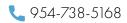
305-503-4141

Welcome Video [▶

Finance Department: Driving Efficiency & Accountability









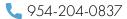
Ensuring Compliance, Protecting Integrity

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



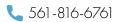




ASO (Agency Supervisory Officer)- South



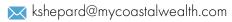


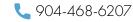




ASO (Agency Supervisory Officer)- North







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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





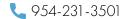
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PDS (Practice Development Specialist)







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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







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Strategic Planning, Simplified

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



Your Financial Planning Team

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



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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

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Home Office Contacts

Life Insurance

Life Regional Sales Director

■ Denny McCarty
✓ dmccarty@massmutual.com
↓ 813-857-8364

Life Sales Consultant

Annuity

Annuity Regional Sales Director

Annuity Sales Consultant

■ Jay Mazur

✓ Jmazur 16@massmutual.com

✓ 413-744-6928

Annuity Sales Consultant

■ Kenny Herrera

■ kherrera@massmutual.com

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Disability Income

DI Regional Sales Director

Astone 14@massmutual.com \$\square\$ 980-233-1024

DI Sales Consultant

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!

C ASTAL WEALTH

www.mycoastalwealth.com









