

**FPA OF MICHIGAN 2024 ANNUAL SYMPOSIUM**

*Thank you to our Symposium Partners and Sponsors!*

Shara Wallace, VP, Regional Director  
Ares Wealth Management Solutions LLC  
Tel: 312-887-0776  
Email: [swallace@aresmgmt.com](mailto:swallace@aresmgmt.com)  
Website: [www.aresmgmt.com](http://www.aresmgmt.com)  
**LEADING PARTNER**

Sean Galer  
Comprehensive Planning  
Tel: 248-457-2312  
Email: [sean@compreplan.com](mailto:sean@compreplan.com)  
Website: [www.compreplan.com](http://www.compreplan.com)  
**LEADING PARTNER**

Diana Cicilian  
Comprehensive Planning  
Tel: 586-214-5881  
Email: [diana@compreplan.com](mailto:diana@compreplan.com)  
Website: [www.compreplan.com](http://www.compreplan.com)  
**LEADING PARTNER**

Olivia Sjostrom  
Dimensional Fund Advisors  
Tel: 409-877-8390  
Email: [olivia.sjostrom@dimensional.com](mailto:olivia.sjostrom@dimensional.com)  
Website: <https://www.dimensional.com/us-en/financial-professionals>  
**LEADING PARTNER**

John Kranik, Jr.  
Dimensional Fund Advisors  
Tel: 512-306-4330  
Email: [John.Kranik@dimensional.com](mailto:John.Kranik@dimensional.com)  
Website: [Dimensional.com](http://Dimensional.com)  
**LEADING PARTNER**

Joe Stuhr  
Dimensional Fund Advisors  
Tel: 512-306-5067  
Email: [Joe.Stuhr@dimensional.com](mailto:Joe.Stuhr@dimensional.com)  
Website: [Dimensional.com](http://Dimensional.com)  
**LEADING PARTNER**

Tyler Sigler  
First Trust Advisors, L.P.  
Tel: 313-600-0610  
Email: [tsigler@ftadvisors.com](mailto:tsigler@ftadvisors.com)  
Website: [www.ftportfolios.com](http://www.ftportfolios.com)  
**LEADING PARTNER**

Mark DeKorne  
First Trust Advisors, L.P.  
Tel: 616-647-7974  
Email: [mdekorne@ftadvisors.com](mailto:mdekorne@ftadvisors.com)  
Website: [www.ftportfolios.com](http://www.ftportfolios.com)  
**LEADING PARTNER**

**FPA OF MICHIGAN 2024 ANNUAL SYMPOSIUM**

*Thank you to our Symposium Partners and Sponsors!*

Del Wensley  
Carrico Maldegen Insurance Agency  
Tel: 248-504-2551  
Email: [dwensley@carricomaldegen.com](mailto:dwensley@carricomaldegen.com)  
Website: [www.carricomaldegen.com](http://www.carricomaldegen.com)  
**CONNECTING PARTNER**

Rich Carrico  
Carrico Maldegen Insurance Agency  
Tel: 248-773-7932  
Email: [rcarrico@carricomaldegen.com](mailto:rcarrico@carricomaldegen.com)  
Website: [www.carricomaldegen.com](http://www.carricomaldegen.com)  
**CONNECTING PARTNER**

Nick Carrico, CIC  
Carrico Maldegen Insurance Agency  
Tel: 248-504-2552  
Email: [ncarrico@carricomaldegen.com](mailto:ncarrico@carricomaldegen.com)  
Website: [www.carricomaldegen.com](http://www.carricomaldegen.com)  
**CONNECTING PARTNER**

Joshua Mathia, MBA, CLTC  
Carrico Maldegen Insurance Agency  
Tel: 248-714-5793  
Email: [jmathia@carricomaldegen.com](mailto:jmathia@carricomaldegen.com)  
Website: [www.carricomaldegen.com](http://www.carricomaldegen.com)  
**CONNECTING PARTNER**

Chris Boyce  
Charles Schwab  
Tel: 224-477-6690  
Email: [chris.boyce@schwab.com](mailto:chris.boyce@schwab.com)  
Website: <https://www.schwabcharitable.org/>  
**CONNECTING PARTNER**

Ruby Pediangco, J.D.  
Charles Schwab  
Tel: 612-750-6815  
Email: [ruby.pediangco@schwab.com](mailto:ruby.pediangco@schwab.com)  
Website: <https://www.schwabcharitable.org/>  
**CONNECTING PARTNER**

Erica Jennewine, CAPI, CPRM  
Chubb  
Tel: 248-765-7946  
Email: [erica.jennewine@chubb.com](mailto:erica.jennewine@chubb.com)  
Website: [www.chubb.com](http://www.chubb.com)  
**CONNECTING PARTNER**

Jordan Summers, JD  
Credit Union Trust  
Tel: 989-388-1713  
Email: [jsummers@credituniontrust.com](mailto:jsummers@credituniontrust.com)  
Website: [www.credituniontrust.com](http://www.credituniontrust.com)  
**CONNECTING PARTNER**

## FPA OF MICHIGAN 2024 ANNUAL SYMPOSIUM

*Thank you to our Symposium Partners and Sponsors!*

John Landis, CFP®  
Credit Union Trust  
Tel: 313-407-4154  
Email: [jlandis@credituniontrust.com](mailto:jlandis@credituniontrust.com)  
Website: [credituniontrust.com](http://credituniontrust.com)  
**CONNECTING PARTNER**

Ryan Thelen, CIMA, CEPA  
John Hancock Investment Management  
Tel: 248-826-8783  
Email: [rthelen@jhancock.com](mailto:rthelen@jhancock.com)  
Website: <https://www.jhinvestments.com/>  
**CONNECTING PARTNER**

Patrick Verdon, CIMA  
John Hancock Investment Management  
Tel: 616-469-4327  
Email: [patrick\\_verdon@jhancock.com](mailto:patrick_verdon@jhancock.com)  
Website: [jhinvestments.com](http://jhinvestments.com)  
**CONNECTING PARTNER**

Brad Feeley CIMA, CETF  
John Hancock Investment Management  
Tel: 630-319-0566  
Email: [bfeeley@jhancock.com](mailto:bfeeley@jhancock.com)  
Website: [www.jhinvestments.com](http://www.jhinvestments.com)  
**CONNECTING PARTNER**

Jerry Auippa, CRMP  
Longbridge Financial  
Tel: 281-460-2267  
Email: [jauippa@longbridge-financial.com](mailto:jauippa@longbridge-financial.com)  
Website: <https://advisors.longbridge-financial.com/>  
**CONNECTING PARTNER**

Jason Fox  
Meketa Capital  
Tel: 720-697-1014  
Email: [jfox@meketacapital.com](mailto:jfox@meketacapital.com)  
Website: <https://meketacapital.com/>  
**CONNECTING PARTNER**

Lauren Metaj  
FlexShares ETFs and Northern Trust Asset Management  
Tel: 248-361-5842  
Email: [lm252@ntrs.com](mailto:lm252@ntrs.com)  
Website: [www.flexshares.com](http://www.flexshares.com)  
**COMMUNITY PARTNER**

Chad Creasey CLU  
RCB & Associates LLC  
Tel: 616-822-9286  
Email: [ccreasey@rcbassociatesllc.com](mailto:ccreasey@rcbassociatesllc.com)  
Website: [www.rcbassociatesllc.com](http://www.rcbassociatesllc.com)  
**COMMUNITY PARTNER**

**FPA OF MICHIGAN 2024 ANNUAL SYMPOSIUM**  
*Thank you to our Symposium Partners and Sponsors!*

Keith McFadyen  
Sit Mutual Funds  
Tel: 630-235-0065  
Email: krm@sitinvest.com  
Website: sitmutualfunds.com  
**COMMUNITY PARTNER**

Nathan Tawes CFP, CIMA  
T. Rowe Price  
Tel: 443-813-9345  
Email: nathan.tawes@troweprice.com  
Website: www.troweprice.com  
**COMMUNITY PARTNER**

David Weeks, CFS  
T. Rowe Price  
Tel: 410-274-6482  
Email: david.weeks@troweprice.com  
Website: troweprice.com  
**COMMUNITY PARTNER**

Tim Wyman, CFP®, JD  
Center for Financial Planning, Inc.  
Tel: 248-948-7900  
Email: timothy.wyman@CenterFinPlan.com  
Website: www.centerfinplan.com  
**COCKTAIL RECEPTION SPONSOR**

John Crandell, AIF  
Principal Asset Management  
Tel: 248-459-4449  
Email: crandell.john@principal.com  
Website: www.principalam.com  
**THURSDAY AFTERNOON BREAK SPONSOR**

Chuck Story, CPA, CFE  
Rehmann  
Tel: 810-513-7336  
Email: chuck.story@rehmann.com  
Website: www.rehmann.com  
**THURSDAY LUNCH SPONSOR**

Tom Needham  
Locorr Funds  
Tel: 248-444-6200  
Email: tneedham@locorrfunds.com  
Website: www.locorrfunds.com  
**THURSDAY MORNING BREAK SPONSOR**

Lou Camacho  
Stratos Wealth Partners  
Tel: 440-991-1170  
Email: lcamacho@stratoswa.com  
Website: <https://www.stratoswealthpartners.com/>  
**SPEAKER SPONSOR**