

Leadership Team	Email	Phone	Fax
Matt Meyer, Director—Life and Annuity Distribution	mmeyer@locktonaffinity.com	424-387-4143	
Erik Mora, Director—RIA Business Services	emora@locktonaffinity.com	949-689-2579	
Ryan Delaney, Director—RIA Business Services	rdelaney@locktonaffinity.com	949-751-7407	
Jeff Kehne, Controller/Operations Manager	jkehne@locktonaffinity.com	763-404-8383	763-404-8391
Eji Maxilom, AVP Operations Manager	emaxilom@locktonaffinity.com	619-485-8040	
Mike Helmbrecht, AVP Client Services	mhelmbrecht@locktonaffinity.com	763-404-7113	763-404-8368
Rena Guetzkow, Client Services Manager	renaeg@locktonaffinity.com	763-404-7107	
Relationship Management Team — External <i>Point-Of-Sale Assistance, Business Development</i>			
Bryce Bohl, Business Development Consultant	bbohl@locktonaffinity.com	612-251-9167	763-404-8375
Chris Stone, Business Development Consultant	clstone@locktonaffinity.com	805-342-0027	
Michael Robinson, Business Development Consultant	mrobinson@locktonaffinity.com	619-404-3038	
Shawn Sullivan, CLU®, ChFC®, Business Development Consultant	ssullivan@locktonaffinity.com	763-404-7111	763-404-8366
Wes Barton, Business Development Consultant	wbarton@locktonaffinity.com	415-279-0743	
Courtney Davies, Business Development Consultant	cdavies@locktonaffinity.com	203-559-9917	
Mark Bonner, Executive Business Consultant	mark.bonner@locktonaffinity.com	913.262.5709	
Mario Montalvo, Business Development Consultant	mario.montalvo@locktonaffinity.com	949.899.4127	
Relationship Management Team — Internal <i>Product Illustrations, Case Design, Advanced Planning, Product Selection</i>			
Cat Bevier, Senior Product Specialist	cbevier@locktonaffinity.com	619-404-3037	619-333-5054
John Beaton, Executive Business Consultant	jbeaton@locktonaffinity.com	508-367-7955	
Joe Beranger, Advanced Planning Specialist	joe.beranger@locktonaffinity.com	763-404-7103	
Cassie Schuh, Internal Business Development Partner	cassie.schuh@locktonaffinity.com	619-387-9275	
Agency Services Team — New Business <i>New Business Processing, Application Forms, Case Status, Underwriting, Contracting & Licensing</i>			
Cathy Montoya, Licensing & Contracting Specialist	cmontoya@locktonaffinity.com	763-703-5362	763-404-8362
Erin Enna, Senior Case Manager	eenna@locktonaffinity.com	763-703-5363	763-404-8376
Jean Hall, Senior Case Manager – Underwriter	Jean.hall@locktonaffinity.com	763-404-7117	763-404-8372
Jennifer Adams, Senior Case Manager	jadams@locktonaffinity.com	435-352-1734	763-296-1214
Kim Nelson, Senior Case Manager	ksnelson@locktonaffinity.com	763-404-8382	763-404-8392