

Your KWB Team

At KWB Wealth, you can expect a friendly — and real — person to answer your calls, email, and pick up right where we left off. To make sure your questions are addressed by the right teammate, please use this guide.

WEALTH MANAGERS



Kerry Bubb



Diana Sailer



Michael Razzouk



Quentin Bubb



Rachel Bubb



Claire Olmstead

- Investment selection/ portfolio construction
- Estate planning / living trust questions
- Retirement plans
- Financial planning
- Notification of any significant life updates

ASSOCIATE WEALTH MANAGERS



Leslie Carnahan



Aaron Garcia

- Basic financial planning updates
- Estate planning / living trust questions
- General tax information
- Cash flow planning

PORTFOLIO MANAGEMENT



Steve Gormley



Ricky Salinas

- Technical investments and strategies
- Market and economic trends
- Individual stocks and bonds
- Trading

CLIENT SERVICE



Jamie Vickery



Perla Caballero



Nancy Abdalla



Jose Martinez

- Changes to contact information
- Paperwork processing
- Online account access
- Request for funds
- Update banking information
- LPL correspondence & information

CLIENT EXPERIENCE



Katie Reynosa



Cori Parks

- KWB event coordination
- Support new client onboarding
- General tax information and coordination with client CPAs

SCHEDULING



Pam Gormley • email: pam@kwbwealth.com

- Coordination and scheduling of appointments
- General office information and assistance with office navigation



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