



**Mike Kelly**  
*President | CEO*



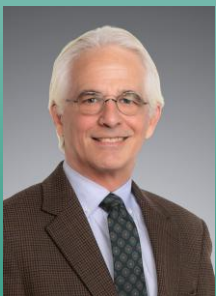
**Mike Kelly, Jr.**  
*EVP | COO*



**Patrick Harvey**  
*SVP | CFO*



**Zachary Furshman**  
*VP of Operations*



**David Read**  
*Retirement Services Director*



**Andy Kelly**  
*Senior Associate*



**Bryan Wasserman**  
*Senior Associate*



**Kristen Gukanovich**  
*Benefit Services Director*



**Nicholas Schmitt**  
*Risk Management Specialist*



**Tracy Ireland**  
*Client Services Manager*



**Amanda Kelly**  
*Operations Associate*



**McKenna Kelly**  
*Operations Associate*

## ***Private Wealth Management***

- Financial Planning
- Family & Wealth Protection
- Wealth Accumulation

**Amanda Kelly**  
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**Zachary Furshman**  
✉ [zfurshman@getkbi.com](mailto:zfurshman@getkbi.com)

## ***Employee Benefits***

- Employee Benefit Products
- Tax-Qualified Retirement Plans
- Business Continuation Planning
- Executive Benefit Planning

**Kristen Gukanovich**  
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**McKenna Kelly**  
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## ***Corporate Retirement Plans***

- Plan Design Setup
- Investment Strategy Oversight
- Fiduciary Guidance
- Vendor Benchmarking Management

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**David Read**  
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## ***Risk Management***

- Commercial Insurance
- Personal Insurance
- Bonding

**Nicholas Schmitt**  
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