

# Supplement to the Vanguard Personal Advisor Select Brochure

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This brochure supplement provides information about Vanguard Personal Advisor Select® advisory services under Vanguard Advisers, Inc. (“VAI”), the registered investment advisor, that supplements the Vanguard Personal Advisor Select Brochure.

You should have received a copy of the respective brochure. Please contact VAI at the number above if you didn’t receive a brochure or if you have any questions about the contents of this supplement.

Additional information about VAI is available on the SEC website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## Educational background and business experience

Your financial planner from Vanguard Advisers, Inc. (“VAI”), will have several years of experience with investment products in addition to the Vanguard group of mutual funds and is a registered investment advisor representative.

All of VAI’s financial planners have completed Vanguard’s own financial training program covering: retirement and education investing and analysis, investment and asset allocation principles, VAI’s investment advisory methodology, client communications, ethics, and compliance issues. In addition, the financial planners participate in ongoing seminars and training programs conducted both by Vanguard and by independent financial planning organizations.

Many of VAI’s financial planners hold the Certified Financial Planner™ (CFP) certification. To obtain the certification, financial planners are required to meet the following four criteria set forth by the Certified Financial Planner Board of Standards:

- The certificant must have a bachelor’s degree (or higher) or its equivalent, in any discipline, from an accredited college or university, and successfully complete one of the following additional education requirements: a CFP board-registered program, a challenge status, or a transcript review.
- The certificant must pass the CFP Certification Examination that assesses his or her ability to apply financial planning knowledge, in an integrated format, to financial planning situations.

- The certificant must have three years of full-time relevant personal financial planning experience.
- The certificant must agree to adhere to the Certified Financial Planner Board of Standards’ Code of Ethics and Professional Responsibility, Rules of Conduct, and Financial Planning Practice Standards.

VAI has no affiliation with the Certified Financial Planner Board of Standards.

## Vanguard Personal Advisor Select financial planners

In addition to name, year of birth, and formal education after high school, the current position and business experience for at least the preceding five years is included below for each financial planner.

### **Penelope Karp Abad, CFP® (1985)**

B.A. Government, Connecticut College (2007)  
Financial planner, Vanguard (2019–present); investment consultant, Vanguard (2019)

### **John Kyle Abella, CFP® (1992)**

B.S. Marketing and Finance, West Chester University (2016)  
Financial planner, Vanguard (2019–present)

### **Selena E. Abraham, CFP® (1976)**

B.S. Health care management, Belmont Abbey College (1998)  
Financial planner, Vanguard (2019–present)

### **Curtis Martin Ackerly, CFP® (1994)**

B.S. Finance and Risk management and insurance, University of South Carolina (2016)  
Financial planner, Vanguard (2021–present); sales consultant, Vanguard (2020–2021); retirement specialist, Vanguard (2019–2020)

### **Isaac Martin Acosta Montenegro, CFP® (1989)**

B.S.B.A. Finance, The University of North Carolina at Charlotte (2013)  
B.S. Economics, The University of North Carolina at Charlotte (2013)  
Financial planner, Vanguard (2019–present)

### **James R. Acuna (1979)**

B.A. Political science, The State University of New York at Albany (2002)  
M.S. Secondary education, College of Saint Rose (2004)  
Manager, Vanguard (2019–present)

**Gregory J. Adams, CFP® (1976)**

B.A. Business, Belmont Abbey College (1998)  
Financial planner, Vanguard (2019–present)

**Ryan M. Adams, CFP® (1977)**

B.S. Business administration, Arizona State University (2003)  
Financial planner, Vanguard (2019–present)

**Ryan Matthew Adler (1981)**

B.A. Liberal studies, California State University, East Bay (2003)  
Financial planner, Vanguard (2022–present); client development professional, JPMorgan Chase (2021–2022); customer relationship manager, Fidelity (2020–2021); financial advisor, Ameriprise Financial (2019–2020); specialist, Apple (2019); recruiter, Keller Williams (2019)

**Stephen S. Ajemian, CFP® (1976)**

B.A. Business administration, University of Delaware (1999)  
M.B.A., Saint Joseph's University (2011)  
Manager, Vanguard (2019–present)

**Jonathan Edward Akley, CFP® (1983)**

B.S. Business management, Arizona State University (2015)  
Financial planner, Vanguard (2021–present); client consultant, Vanguard (2019–2021)

**Bethany Albertson (1994)**

B.S.B.A. Finance, Northern Arizona University (2016)  
Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021)

**Ryan Albright (1999)**

B.S. Personal finance, University of Wisconsin-Madison (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); financial planning intern, Jacobson and Schmitt Advisors (2021–2022); financial planning intern, WEA Member Benefits (2021–2022); teaching assistant, University of Wisconsin-Madison School of Human Ecology (2020–2022); student desk staff, University of Wisconsin Housing Desk Service (2020–2021); student laborer, Wisconsin Public Service (2019–2020); seasonal produce clerk, Festival Foods (2019–2020)

**Stanislav Alemaskin, CFP® (1983)**

A.S. Marketing, Delaware County Community College (2013)  
B.S. Marketing, West Chester University of Pennsylvania (2017)  
M.B.A. Finance, Wilmington University (2021)  
Financial planner, Vanguard (2021–present); banker III, Truist Financial (2020–2021); partner, Scavenger Cycles LLC (2019–2020)

*Outside activities:* Mr. Alemaskin is an owner of rental property. Vanguard Advisers, Inc., has no affiliation with the rental property, and Mr. Alemaskin's responsibilities do not conflict with his position at Vanguard.

**Syed M. Ali, CFP® (1979)**

B.S., SUNY Binghamton (2001)  
Financial planner, Vanguard (2019–present)

**Wesley Aliotti, CFP® (1989)**

B.S. Finance and banking, Appalachian State University (2013)  
Manager, Vanguard (2022–present); financial planner, Vanguard (2019–2022)

**Anthony P. Allen, CFP® (1971)**

B.A., University of Georgia (1993)  
Financial planner, Vanguard (2019–present)

**Caroline Elise Allen, CFP® (1984)**

B.B.A. Finance, Grand Valley State University (2008)  
Financial planner, Vanguard (2019–present)

**Derek Allen, CFP® (1983)**

B.I.S. Interdisciplinary studies/Economics and Business, Arizona State University (2006)  
Financial planner, Vanguard (2019–present)

**Samantha Angella Allen, CFP® (1989)**

B.S. Accounting, Wingate University (2018)  
Financial planner, Vanguard (2020–present); store clerk, The Reddoor (2019–present); client consultant, Vanguard (2019–2020); client service specialist, Vanguard (2019)

**William Allen (1984)**

B.A. Accounting, Arizona State University (2022)  
Financial planner, Vanguard (2023–present); advisor support representative, Vanguard (2021–2023); financial services consultant, TIAA (2021); transportation specialist, Uber (2019–2021); owner, Photoshoot 24/7 (2019)

**Jayson Lee Allsbrook, CFP® (1996)**

B.S. Finance, Virginia Tech (2018)  
Financial planner, Vanguard (2019–present); financial advisor development program, Vanguard (2019)

**Nathan Amann, CFP® (1987)**

B.S. Finance, University of Central Florida (2009)  
M.B.A., Florida Southern College (2012)  
Financial planner, Vanguard (2022–present); senior fintech product owner, Edward Jones (2022); digital advisor product owner, Vanguard (2020–2022); financial planner, Vanguard (2019–2020)

**Alfred Joseph Amato III, CFP® (1998)**

B.B.A. Financial planning and Risk management and insurance, Temple University (2021)  
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); advice intern, Randstad (2020); administrative individual insurance and wealth management support intern, Leon L. Levy & Associates (2019–2020); general agent, Northwestern Mutual (2019)

**Gladimir Ambroise, CFP® (1976)**

B.A. International economics, Saint Francis College (2002)  
Manager, Vanguard (2020–present); supervisor, Vanguard (2019–2020)

**Sara L. Amparan, CFP® (1986)**

B.S. Business management with a certificate in International business, Arizona State University (2008)  
Financial planner, Vanguard (2019–present)

**Lauren Nicole Anastasio, CFP® (1984)**

B.A. Psychology, University of Delaware (2006)  
M.B.A., University of Delaware (2010)  
M.S. International business, Grenoble Ecole de Management (2011)  
Financial planner, Vanguard (2023–present); director, financial advice, Stash (2021–2022); financial planner, SoFi (2019–2021)

**Camisha Anderson (1997)**

B.S. Finance, The University of Tennessee, Chattanooga (2019)  
Financial planner, Vanguard (2023–present); client associate, Vanguard (2021–2023); brokerage service representative, Wells Fargo (2020); brokerage service representative, Associate Staffing (2019–2020); sales associate, Target (2019)

**Kyle Edward Anderson, CFP® (1987)**

B.S. Business management, University of Arizona (2012)  
Financial planner, Vanguard (2019–present)

**Michael J. Angelo (1976)**

B.S. Business administration, Susquehanna University (1998)  
Manager, Vanguard (2021–present); sales manager, Vanguard (2019–2021)

**John Tierney Anstoetter (2000)**

B.B.A. Finance, The University of Iowa (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); investment operations extended intern, Principal Global Investors (2021); café team member, Lifetime Athletic (2019)

**Claudiu Mihai Antonie (1999)**

B.S. Finance, College of Charleston (2021)  
Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); financial advisor intern, Family Asset Management (2019); tutor, College of Charleston (2019)

**Timothy Joseph Apple (1994)**

B.A. Finance, Virginia Tech (2017)  
Financial planner, Vanguard (2022–present); client representative, Vanguard (2021–2022); client case representative, Vanguard (2020–2021); client relationship associate, Vanguard (2019–2020); agent, William C. Moore Financial Services (2019)

**Brian D. Applestein, CFP® (1967)**

B.A. Political economy, Muhlenberg College (1990)  
Financial planner, Vanguard (2019–present)

**Matthew Laanan Aquino (1985)**

B.Ed. General education, California State University, Northridge (2008)  
Financial planner, Vanguard (2022–present); investment counselor, Fisher Investments (2021–2022); financial consultant academy trainee, Charles Schwab (2019–2021); business development manager, Profile by Sanford (2019)

**McKenna Nicole Arensen, CFP® (1994)**

B.S. Business administration, Arizona Christian University (2016)  
Financial planner, Vanguard (2020–present); workforce management analyst, Vanguard (2019–2020)

**Jessica Arias, CFP® (1983)**

B.A. Business administration, New Mexico State University (2005)  
M.B.A., New Mexico State University (2006)  
Financial planner, Vanguard (2019–present)

**Grant Wesley Armstrong Jr., CFP® (1961)**

B.A. International studies, The University of North Carolina at Chapel Hill (1985)  
M.R.P., Economics and community development, The University of North Carolina at Chapel Hill (1991)  
Financial planner, Vanguard (2022–present); personal financial counselor, Zeiders Enterprises, Inc. (2019–2022)

**Raymond Arroyo, CFP® (1977)**

B.S. Communication, Illinois State University (2000)  
Financial planner, Vanguard (2022–present); financial advisor, PFG Advisors (2021–2022); financial advisor, Prudential (2020–2021); financial specialist, Allstate Financial Services (2019–2020)

**Phillip Asuelo (1999)**

B.A. Financial planning, Arizona State University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); college financial representative, Northwestern Mutual (2021); sales associate, Target (2020); cashier, Dairy Queen (2019)

**Dani AtenousAzar (1995)**

B.S. Political science, Arizona State University (2017)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); orders client representative, Vanguard (2021–2022); client relationship associate, Vanguard (2020–2021); research and policy director, Anita for Arizona (2019–2020); elections and annexation aide, City of Phoenix (2019); steering committee member, Indivisible Project (2019)

**Tracy Gelber Auerbach (1966)**

B.A. French and francophone studies, University of Pennsylvania (2019)  
Financial planner, Vanguard (2021–present); Vanguard Return to Work intern, Randstad (2021); vice president, Adondo Corporation (2019)

**Julie Scott Aument, CFP® (1982)**

B.A. Communications, The University of North Carolina at Chapel Hill (2005)  
Financial planner, Vanguard (2019–present)

**Jonathan Axtell, CFP® (1970)**

B.A. Business administration, Belmont Abbey College (1993)  
M.B.A., Appalachian State University (1994)  
Financial planner, Vanguard (2019–present)

**Cem Suleyman Baber, CFP® (2000)**

B.B.A. Finance, University of Houston (2021)  
B.B.A. Marketing, University of Houston (2021)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); financial advisor assistant, Dearborn & Creggs (2021–2022); Bauer Honors mentor, University of Houston – Bauer Honors Program (2020–2021); student worker, University of Houston – Rockwell Career Center (2020–2021); financial representative intern, Northwestern Mutual (2020)

**Erica Baczkowski, CFP® (1991)**

B.S. Marketing, West Chester University (2013)  
M.B.A. Management, West Chester University (2018)  
Financial planner, Vanguard (2023–present); wealth management associate, Vanguard (2019–2023)

**Sally Baek (1961)**

B.A. Political science, Oberlin College and Conservatory (1983)  
M.P.A., Columbia University (1985)  
M.B.A., University of Pennsylvania (1989)  
Financial planner, Vanguard (2022–present); Vanguard Return to Work intern, Randstad (2022); retirement specialist, Merrill Lynch (2019)

**Beecher Bailey, CFP® (1958)**

B.S. Communications, The University of Tennessee, Knoxville (1980)  
Financial planner, Vanguard (2019–present)

**Jason Robert Bailey, CFP® (1982)**

B.S. Finance, The University of North Carolina at Charlotte (2005)  
Financial planner, Vanguard (2019–present)

**Katie Baillargeon, CFP® (1989)**

A.A.S., Whatcom Community College (2008)  
A.S. Health science laboratory technology, The George Washington University (2010)  
B.A.B.A. Finance, University of Washington Tacoma (2016)  
M.S. Personal financial planning, Texas Tech University (2021)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); associate, Kohl's (2021); financial analyst, The Geneva Foundation (2019–2021)

**Nicholas Paul Baker (1998)**

B.S. Business administration, Winthrop University (2020)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); retirement specialist, Vanguard (2020–2022); intern, OneMain Financial (2019–2020)

**Richard Baker (1961)**

University of Maryland (1979–1983, non-degree)  
Financial planner, Vanguard (2021–present); mid-Atlantic sales manager, Superio Brand (2019–2020); financial advisor, 1847 Financial (2019–2020)

**Charles C. Ball, CFP® (1983)**

B.S. Political science, Arizona State University (2006)  
Financial planner, Vanguard (2019–present)

**Aditya Banerji, CFP® (1997)**

B.A. Economics., University of South Carolina (2019)  
Financial planner, Vanguard (2023–present); sales consultant, Vanguard (2022–2023); retirement specialist, Vanguard (2020–2022); client relationship associate, Vanguard (2020); communications intern, Better Business Bureau (2019)

**Gabriel Palmieri Barakat (1999)**

B.S. Finance and Information technology management, Seton Hall University (2021)  
Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); delivery driver, Panera Bread (2019–2020); financial intern, Thrive Wealth Management (2019)

**Julianne Barar, CFP® (1980)**

B.S. Business administration, emphasis in Finance, California State University, Dominguez Hills (2005)  
Financial planner, Vanguard (2019–present)

**Garrett Barkley, CFP® (1990)**

B.S.B.A. Business economics and Marketing, University of South Carolina (2013)  
Financial planner, Vanguard (2022–present); technology product owner, Infosys (2020–2022); business technology product administrator, Vanguard (2019–2020)

**Dylan Barrera, CFP® (1989)**

B.A. Economics, University of Nevada Las Vegas (2013)  
Financial planner, Vanguard (2022–present); financial advisor, Link Financial Advisory (2020–2022); financial advisor, Capstone Partners Insurance and Investment Services (2020); registered investment advisor, PFS Investments, Inc. (2019–2020)  
*Outside activities:* Mr. Barrera is president of CTENOW, LLC. Vanguard Advisers, Inc., has no affiliation with CTENOW, LLC, and Mr. Barrera's responsibilities do not conflict with his position at Vanguard.

**Christopher T. Batastini (1970)**

B.S. Business management, Shippensburg University (1993)  
Financial planner, Vanguard (2021–present); financial advisor, Prudential Financial (2019–2021)

**Amanda Brooke Bateman, CFP® (1988)**

B.S. Business management, Liberty University (2010)  
Financial planner, Vanguard (2023–present); financial advisor, Dentist Advisors (2021–2023); financial planner, Vanguard (2021); relationship manager, Vanguard (2019–2021)

**Elizabeth Battaglia, CFP® (1991)**

B.S. Business administration, The University of Vermont (2013)  
Financial planner, Vanguard (2019–present)

**Jonathan W. Battiste, CFP® (1983)**

B.S. Psychology, Saint Joseph's University (2005)  
Financial planner, Vanguard (2019–present)

**Walter Russell Bay, CFP® (1989)**

B.S. Sports marketing and management, Indiana University (2012)  
Financial planner, Vanguard (2019–present)



**Thomas Beatie, CFP® (1974)**

B.A. Health sciences, University of Hawaii (1996)  
Financial planner, Vanguard (2022–present); client representative, Vanguard (2019–2022)

**Davis Beazer (1997)**

B.S. Personal financial planning, Utah Valley University (2022)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); customer support agent, TaxHawk, Inc. (2022); customer advocacy, Alder Security (2021); remote summer intern, Randstad (2021); summer intern, Vision Financial Advisors, LLC (2020); customer service agent, Alder Security (2019–2020)

**Michael Zachary Bechard, CFP® (1989)**

B.S. Psychology, University of Kentucky (2011)  
M.A. Clinical psychology, West Chester University (2013)  
Financial planner, Vanguard (2022–present); portfolio specialist, Fidelity Investments (2020–2022); client management representative, Fidelity Investments (2020); managed account support specialist, Fidelity Investments (2019–2020); private client group representative, Fidelity Investments (2019)

**Todd D. Bechtel, CFP® (1972)**

B.S. Business administration, West Chester University (1995)  
Financial planner, Vanguard (2019–present)

**Jeff Beck, CFP® (1989)**

B.A. Economics, The University of Texas at Austin (2011)  
Financial planner, Vanguard (2022–present); senior financial advisor, Personal Capital (2021–2022); financial advisor, Personal Capital (2020–2021); financial consultant, E\*TRADE (2019)

**Mary Beth Becker (1963)**

B.S. Criminal justice, The University of Scranton (1988)  
J.D., Ohio Northern University (1994)  
Manager, Vanguard (2019–present)

**Stephen Becker (1988)**

B.S. Finance, Portland State University (2011)  
Financial planner, Vanguard (2022–present); consultant, Syndicate Tactical Solutions (2021–2022); disability insurance specialist, Sedgwick (2019–2021); day trader, self-employed (2019–2022)

**Douglas Allen Beckner, CFP® (1994)**

B.A. Finance and Economics, Wofford College (2017)  
Financial planner, Vanguard (2019–present); operations service administrator, Vanguard (2019); investment professional, Vanguard (2019)

**Brandon Beers (1975)**

University of Oregon (1996–1997, non-degree)  
Utah State University (1999, non-degree)  
Financial planner, Vanguard (2022–present); client case consultant, Vanguard (2019–2022); inheritance consultant, Vanguard (2019)

**Britta Beesley (2000)**

B.S. Personal financial planning, Kansas State University (2022)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); strategy and portfolio management intern, INTRUST Bank (2021); intern, Raymond James Financial Services (2020–2021); teacher's assistant, Kansas State University (2019–2022)

**Jeremy A. Beil, CFP® (1979)**

B.S. Finance, The Pennsylvania State University (2002)  
M.B.A., Saint Joseph's University (2010)  
Financial planner, Vanguard (2019–present)

**Jeremy Belingon (2000)**

B.B.A. Finance and Accounting, Villanova University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); basketball summer camp coach, West Chicago Community High School (2021); team member associate, Follett (2019–2020)

**Austin Bell, CFP® (1993)**

B.S. Finance, University of Louisville (2016)  
Financial planner, Vanguard (2021–present); financial advisor, LPL Financial DBA First Harrison Financial Services (2019–2020)

**Travis Bell, CFP® (1991)**

B.A. Geography, University of South Carolina (2013)  
Manager, Vanguard (2019–present)

**Carlos Fernando Benitez (1996)**

B.A. Business technology with a certificate in International business, Arizona State University (2018)  
Financial planner, Vanguard (2021–present); financial advisor, Renaissance Financial (2019–2021)

**Christopher L. Bennett, CFP® (1974)**

B.S. Business management, Arizona State University (2000)  
Financial planner, Vanguard (2019–present)

**Joseph Bennett, CFP® (1987)**

B.B.A. Finance, University of Houston (2016)  
Financial planner, Vanguard (2023–present); wealth management advisor, Northwestern Mutual (2019–2022)

**Eric Taft Benson, CFP® (1979)**

A.T.P. General business, Chandler Gilbert Community College (2001)  
B.S. Marketing, Arizona State University (2003)  
Financial planner, Vanguard (2019–present)

**James Kent Benson, CFP® (1959)**

B.A. Economics and German, The University of North Carolina at Charlotte (1982)  
Financial planner, Vanguard (2019–present)

**Sary Benzvi, CFP® (1956)**

B.S. Statistics and Political science, University of Haifa (1982)

M.S. Computer science, California State University, Northridge (1994)

M.B.A. International business, California State University, Dominguez Hills (1997)

Ph.D., Business administration, Trident University International (2021)

Financial planner, Vanguard (2022–present); vice president – financial consultant, Charles Schwab (2020–2022); wealth manager, USAA (2019–2020); financial advisor, USAA (2019)

**Matthew James Berger (1999)**

B.S. Finance, The Pennsylvania State University (2021)

Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); deli clerk, Dutchway (2019–2021); direct shopper, Giant (2020–2021), financial advising intern, uFinancial Group (2020–2021); operations intern, Speedway LLC (2019)

**John Bergsma, CFP® (1985)**

B.S. Business administration, Arizona State University (2009)

Financial planner, Vanguard (2020–present); client case representative, Vanguard (2019–2020); client administrator, Vanguard (2019)

**Oliver Roddey Bernhardt, CFP® (1997)**

B.S. International business, The University of North Carolina at Charlotte (2020)

B.A. German, The University of North Carolina at Charlotte (2020)

Financial planner, Vanguard (2022–present); investment specialist, Vanguard (2021–2022); client service representative, Vanguard (2020–2021); server, Noble Food and Pursuits (2019–2021)

**Michael Beroza, CFP® (1984)**

B.A. History, Long Island University (2007)

Financial planner, Vanguard (2019–present); vice president, Foresters Financial (2019)

**Michael Bersano, CFP® (1977)**

B.S. International marketing, Arizona State University (2000)

Financial planner, Vanguard (2019–present)

**Anthony M. Berumen, CFP® (1986)**

B.B.A., Northern Arizona University (2012)

Financial planner, Vanguard (2019–present)

**Zachary Bezella, CFP® (1998)**

B.S. Finance, Arizona State University (2020)

Financial planner, Vanguard (2022–present); territory consultant, Nationwide Financial (2020–2022); data analyst and research associate, N.J. Leven and Associates (2019–2021); college financial representative, Northwestern Mutual (2019)

**Kimberly Bielous, CFP® (1993)**

B.A. International relations, Saint Joseph's University (2016)

Financial planner, Vanguard (2019–present)

**Evan Daniel Bigler, CFP® (1988)**

B.A. Business finance, Saint Joseph's University (2010)

Financial planner, Vanguard (2020–present); financial consultant, Fidelity Investments (2019–2020)

**Melissa A. Bilczewski, CFP® (1973)**

B.S. Finance, Arizona State University (1995)

M.B.A. Management, Western International University (2001)

Manager, Vanguard (2019–present); department head, Vanguard (2019)

**Aubrey Billittier, CFP® (1998)**

B.S. Economics, Edinboro University (2019)

B.S. Business administration, Edinboro University (2019)

Manager, Vanguard (2023–present); Financial planner, Vanguard (2021–2023); financial advisor development program, Vanguard (2020–2021); substitute teacher, Lancaster Central School District (2020); summer associate, FJY Financial LLC (2019)

**Donald William Binckes (1991)**

B.S. Business administration, King's College (2013)

Financial planner, Vanguard (2020–present); client solutions specialist, Vanguard (2019–2020); client service specialist, Vanguard (2019)

**Kaitlin Marie Binkley, CFP® (1992)**

B.S. Business administration, Elizabethtown College (2014)

Financial planner, Vanguard (2019–present)

**AnnMarie Bjorklund, CFP® (1976)**

A.A. Music, Central Bible College (1999)

B.A. Theology, Central Bible College (1999)

Financial planner, Vanguard (2022–present); department head, Vanguard (2019–2022)

**David Blackstone (1964)**

B.A. Economics and Psychology, Northwestern University (1986)

M.B.A., University of Chicago (2000)

J.D., Temple University (2006)

Financial planner, Vanguard (2021–present); financial consultant, self-employed (2019–2020)

**John Blair, CFP® (1993)**

B.S. Economics, Ursinus College (2016)

Financial planner, Vanguard (2019–present)

**Logan C. Blough, CFP® (1990)**

B.S. Business administration, University of South Carolina (2012)

Financial planner, Vanguard (2019–present)

**Lucy Goins Blough, CFP® (1989)**

B.S. Finance, University of South Carolina (2012)

Financial planner, Vanguard (2023–present); financial planner, Facet Wealth, Inc. (2021–2022); paraplanner, John K. McGill & Company, Inc. (2019–2021); planning associate, Modera Wealth Management (2019)

**Brandon Boekel, CFP® (1991)**

B.S. Finance, The Pennsylvania State University (2013)

Financial planner, Vanguard (2019–present)

**Madison Boggs, CFP® (1997)**

B.S. Financial management, Clemson University (2019)  
Financial planner, Vanguard (2020–present); financial advisor development program, Vanguard (2019–2020); on-call branch office assistant, Edward Jones (2019)

**Andrew Donald Bolland (1992)**

B.A. Economics, Washington College (2015)  
Financial planner, Vanguard (2021–present); financial advisor, Mutual of Omaha Investor Services, Inc. (2020–2021); registered representative, Mutual of Omaha Investor Services, Inc. (2019–2020)  
*Outside activities:* Mr. Bolland was a self-employed insurance agent and still receives residual income from his business. Mr. Bolland does not offer new policies to clients. Vanguard Advisers, Inc., has no affiliation with the insurance agency, and Mr. Bolland's residual income does not conflict with his position at Vanguard.

**Laura Boldt, CFP® (1976)**

B.S. Finance, Arizona State University (1998)  
Financial planner, Vanguard (2019–present)

**Thomas Russell Thomasovich Bonifield (2000)**

B.S. Finance, Arizona State University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); retention specialist, State Farm (2020–2022); accounting assistant, Arizona State University (2020); associate, Amazon Logistics (2019); intern, AWM Capital (2019)

**Dwayne Bordelon (1961)**

Financial planner, Vanguard (2022–present); financial advisor, Edward Jones (2019–2021)

**Austin Born (1996)**

B.S. Finance, Saint Joseph's University (2018)  
Financial planner, Vanguard (2023–present); client representative, Vanguard (2021–2023); client case representative, Vanguard (2019–2021); client relationship associate, Vanguard (2019); client relationship associate, Randstad (2019); financial processor, Randstad (2019)

**Derek Randall Bostian, CFP® (1983)**

B.S.B.A Finance, risk management and insurance, The University of North Carolina at Charlotte (2008)  
Financial planner, Vanguard (2023–present); principal, Two Waters Wealth Management (2019–2023)

**William Andrew Bowling, CFP® (1969)**

B.S. Political science, United States Naval Academy (1991)  
Financial planner, Vanguard (2022–present); financial consultant, Charles Schwab (2020–2022); wealth manager, USAA (2019–2020)

**Anthony Boxler, CFP® (1987)**

B.S. Finance and Food marketing, Saint Joseph's University (2009)  
Financial planner, Vanguard (2019–present)

**Ikeem Boyd (1994)**

B.S. Finance and Business management, West Chester University (2017)  
Financial planner, Vanguard (2022–present); private client banker, JPMorgan Chase (2019–2022); financial advisor trainee, Merrill Lynch (2019)

**Michelle Boyer, CFP® (1960)**

B.A. Psychology, George Mason University (1982)  
Financial planner, Vanguard (2019–present)

**Jeremy J. Braccio, CFP® (1974)**

B.A. Broadcasting, Arizona State University (1996)  
Financial planner, Vanguard (2019–present)

**Ryan Jeremy Brackett, CFP® (1991)**

B.S. Finance, West Chester University (2015)  
Financial planner, Vanguard (2019–present)

**Comischell Bradley-Rodriguez, CFP® (1965)**

B.A. Music, Asbury University (1988)  
Manager, Vanguard (2023–present); financial planner, Vanguard (2021–2023); financial advisor, CUSO Financial Services at Ohio University Credit Union (2019–2021); licensed client service associate, United Brokerage Services (2019); financial services professional, New York Life Insurance Company (2019); registered representative, NYLIFE Securities, LLC (2019)  
*Outside activities:* Ms. Bradley-Rodriguez is an owner of rental property. Vanguard Advisers, Inc., has no affiliation with the rental property, and Ms. Bradley-Rodriguez's responsibilities do not conflict with her position at Vanguard.

**Rick Brauer, CFP® (1977)**

B.A. Psychology, Stockton University (formerly The Richard Stockton College of New Jersey) (2000)  
Financial planner, Vanguard (2019–present)

**John Patrick Braun, CFP® (1998)**

B.A. Political science, Gettysburg College (2020)  
Financial planner, Vanguard (2022–present); client relationship associate, Vanguard (2020–2022); finance intern, BLB&B Advisors, LLC. (2019); clubhouse valet, Commonwealth National Country Club (2019); prospect clinic instructor, Gettysburg College (2019)

**Mark Daniel Breiling, CFP® (1981)**

A.B. Business, Yavapai College (2003)  
B.S.B.A Finance, Northern Arizona University (2008)  
M.B.A Financial planning, California Lutheran University (2016)  
Financial planner, Vanguard (2021–present); sales specialist, Vanguard (2019–2021); assigned representative, Vanguard (2019)

**Joyce Breinlinger (1971)**

B.S. Accounting, University of Delaware (1993)  
M.B.A., Loyola University Maryland (2006)  
Financial planner, Vanguard (2022–present); client case representative, Vanguard (2021–2022); business manager, Steven Breinlinger State Farm Agency (2019–2020)

**Kimberly Ann Brenes (1972)**

B.A. Political science, Arizona State University (1994)  
M.I.M. International business management, Thunderbird School of Global Management (1996)  
M.L.I.S. Library and information science, (2012)  
Financial planner, Vanguard (2021–present); freelance business & resume writer, Talent Inc. (2020)

**William Powell Brisley (1984)**

B.A. Political science and Peace, war, and defense, The University of North Carolina at Chapel Hill (2006)  
Manager, Vanguard (2019–present)

**Michael Jo Bristol (1988)**

B.A. Business, Arizona State University (2019)  
Manager, Vanguard (2021–present); financial planner, Vanguard (2020–2021); client solutions specialist, Vanguard (2019–2020); assigned representative, Vanguard (2019)

**Jonathan Keith Britt, CFP® (1992)**

B.A. Psychology, Coker College (2014)  
E.J.D., Purdue University Global (2018)  
Financial planner, Vanguard (2022–present); branch examiner, J.W. Cole (2022); senior financial planner, Facet Wealth (2021–2022); financial advisor, DiPaolo Financial Group (2021); investment counselor, Fisher Investments (2020–2021); relationship manager, Fidelity (2019–2020)

**James R. Broadnix, CFP® (1980)**

B.S. Finance, Florida Atlantic University (2002)  
Financial planner, Vanguard (2021–present); relationship executive, Vanguard (2019–2021)

**Harrison Bromley, CFP® (1989)**

B.S. Finance, West Chester University (2014)  
Financial planner, Vanguard (2022–present); financial advisor, Wealthcare Advisory Partners LLC d/b/a Secure Planning Group LLC (2019–2022); registered representative, LPL Financial LLC (2019–2022); financial advisor, Miller's Insurance Company (2019)

**Ryan Bronowicz, CFP® (1979)**

B.S. Management, Saint Bonaventure University (2006)  
M.B.A. Finance and Accounting, Saint Bonaventure University (2007)  
Financial planner, Vanguard (2019–present)

**Daniel A. Brooks, CFP® (1975)**

B.B.A. Finance, The University of Iowa (1998)  
Financial planner, Vanguard (2019–present)

**Jason Brooks, CFP® (1978)**

B.A. Criminal justice and Psychology, The University of North Carolina at Charlotte (2000)  
M.B.A., University of South Carolina (2018)  
Manager, Vanguard (2019–present)

**Beren Lee Brown, CFP® (1988)**

B.S. Exercise science, Brigham Young University (2013)  
Financial planner, Vanguard (2021–present); investment consultant, Vanguard (2020–2021); client relationship specialist, Vanguard (2019–2020)

**Erik Brown, CFP® (1982)**

B.S. Business administration, Rowan University (2006)  
Financial planner, Vanguard (2019–present)

**Janee Alexandria Nelson Brown (1982)**

B.A. Political science, North Carolina State University (2003)  
M.P.A., Strayer University (2009)  
M.B.A., Pfeiffer University (2014)  
Financial planner, Vanguard (2019–present); operations service administrator, Vanguard (2019); retail inheritance consultant, Vanguard (2019)

**Alec Christopher Bruington (1995)**

B.S. Business administration, University of Missouri (2017)  
Financial planner, Vanguard (2022–present); advisor support representative, Vanguard (2021–2022); portfolio implementation associate, Vanguard (2019–2021); brokerage investment professional, Vanguard (2019)

**Samuel Wilson Bruns, CFP® (1993)**

B.S. Finance and Management, University of South Carolina (2015)  
Financial planner, Vanguard (2019–present)

**Thomas Buckman, CFP® (1991)**

B.B.A. Finance and Marketing, Temple University (2010)  
Financial planner, Vanguard (2021–present); relationship manager, Vanguard (2019–2021)

**Martin Francis Bucko (1962)**

B.S. Accounting, Villanova University (1984)  
Financial planner, Vanguard (2022–present); financial advisor, E\*TRADE (2019–2021)

**Clayton Burke, CFP® (1980)**

B.S. Business management, Northern Arizona University (2006)  
M.B.A. Finance, Grand Canyon University (2009)  
Financial planner, Vanguard (2019–present)

**James David Burney, CFP® (1973)**

B.S. Biology, Furman University (1995)  
M.A. Youth and family ministries, Denver Seminary (2001)  
M.A. Counseling, Denver Seminary (2005)  
Financial planner, Vanguard (2019–present)

**Dawn Marie Buscher, CFP® (1964)**

B.B.A. Finance, The University of Iowa (1988)  
M.B.A., University of Dallas (2000)  
Financial planner, Vanguard (2022–present); planning consultant, Fidelity Investments (2020–2022); senior relationship manager, Fidelity Investments (2019–2020)



**Kyle Busher (1998)**

B.A. Business, organizations, and society, Franklin & Marshall College (2020)

Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); operations analyst, SEI (2020–2021); intern, Morgan Stanley (2019); busser, Stoner Grille (2019); driver, Lyft (2019); delivery driver, NAPA Auto Parts (2019)

**Paul D. Cable, CFP® (1966)**

B.A. Finance, University of Nevada (1996)  
Financial planner, Vanguard (2019–present)

**Daniel Cacioppo, CFP® (1987)**

B.A. Psychology, Immaculata University (2013)  
Financial planner, Vanguard (2019–present)

**Travis Edward Caddell, CFP® (1981)**

B.S. Business administration, Western International University (2012)  
Financial planner, Vanguard (2019–present)

**Simon Cain (1982)**

B.S. Global business and Management, Arizona State University (2008)  
M.S. Financial management, Golden State University (2015)  
Manager, Vanguard (2021–present); academic training leader, Edward Jones (2019–2021)

**Matthew John Callaghan, CFP® (1983)**

B.S. Finance, The Pennsylvania State University (2005)  
M.B.A. Finance and Strategic management, Villanova University (2012)  
Financial planner, Vanguard (2019–present)

**Matthew Callander, CFP® (1995)**

B.S. Financial planning, William Paterson University (2017)  
Financial planner, Vanguard (2019–present)

**Ed Campagna, CFP® (1986)**

B.S. Secondary social studies education, Millersville University of Pennsylvania (2013)  
Financial planner, Vanguard (2019–present)

**Colin Canavan, CFP® (1977)**

B.A. Economics, The University of Arizona (2000)  
M.B.A., University of Phoenix (2004)  
M.S. Financial planning, College for Financial Planning (2015)  
Financial planner, Vanguard (2019–present)

**Richard Travis Carden, CFP® (1996)**

B.B.A. Trust and wealth management, Campbell University (2018)  
M.B.A., Appalachian State University (2020)  
Financial planner, Vanguard (2022–present); senior wealth management associate, Greenleaf Trust (2021–2022); retirement consultant, Empower Retirement (2021); financial advisor, Wells Fargo (2019–2021)

**Jay Thomas Carlson (2000)**

B.S. Finance, Northern Arizona University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); barista, Dutch Bros Coffee (2019–2022)

**Cindy Ann Carpenter, CFP® (1965)**

B.S. Marketing, California State University, Long Beach (1991)  
Financial planner, Vanguard (2022–present); advisor coach, Matson Money (2019–2021); private client banker, JPMorgan Chase (2019)

**Curtis A. Carr, CFP® (1989)**

B.S. Economics, Brigham Young University (2014)  
Financial planner, Vanguard (2019–present)

**Jacob Charles Carr, CFP® (1994)**

B.S. Finance, Winthrop University (2017)  
Financial planner, Vanguard (2022–present); financial advisor, Founders Federal Credit Union (2019–2022)

**Wednesday Carsillo, CFP® (1968)**

B.A. Psychology, Auburn University (1992)  
Financial planner, Vanguard (2019–present)

**Robert Cartafalsa, CFP® (1989)**

B.S.B.A. Finance, Drexel University (2012)  
Financial planner, Vanguard (2019–present)

**Jennifer Nicole Carter, CFP® (1981)**

B.A. Interdisciplinary studies, The University of Texas at Dallas (2010)  
Financial planner, Vanguard (2022–present); financial consultant, E\*TRADE Securities (2020–2022); financial consultant, Fidelity Investments (2019–2020); investment consultant, Fisher Investments (2019)

**Marcus Andre Carter, CFP® (1968)**

B.S. Business administration, Wagner College (1991)  
Financial planner, Vanguard (2021–present); transition manager, Vanguard (2019–2021)

**Michael Carter, CFP® (1974)**

B.S.B.A. Hospitality management and Computer information services, Appalachian State University (2000)  
M.B.A. Finance concentration, New York Institute of Technology (2008)  
Financial planner, Vanguard (2019–present)

**Matthew Joseph Cascio, CFP® (1991)**

B.A. Public health, University of South Carolina (2013)  
Financial planner, Vanguard (2019–present)

**Michael Joseph Casey (1993)**

B.A. Business sustainability, Arizona State University (2016)  
Financial planner, Vanguard (2022–present); client representative, Vanguard (2021–2022); investment professional, Vanguard (2019–2021); brokerage investment professional, Vanguard (2019)

**Rex O. Casey, CFP® (1971)**

B.A. English, Xavier University of Louisiana (1993)  
M.P.A., Indiana University (2007)  
Financial planner, Vanguard (2022–present); investment consultant, Charles Schwab (2021–2022); sales specialist, Vanguard (2020–2021); client service specialist, Vanguard (2019–2020); investment professional, Vanguard (2019)

**Erich Cassidy, CFP® (1981)**

B.S. Business management, Thomas Edison State University (2015)

Financial planner, Vanguard (2022–present); senior financial planner, EP Wealth Advisors (2020–2022); financial planner, MassMutual (2019–2020)

**Kevin Raul Castaneda, CFP® (1999)**

B.S. Economics, Texas A&M University (2021)

Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); sales operation intern, Reynolds & Reynolds (2020); peer advisor, Money Education Center (2019–2021); sales floor associate, Big Lots (2019)

**Evan de Castro (2000)**

B.S. Finance, Virginia Tech (2022)

B.S. Accounting, Virginia Tech (2022)

Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); Vanguard contractor, Randstad (2021); intern, Variant Private Wealth (2020–2021); intern, BoodleAi (2019–2020); associate, Office Depot (2019)

**Cody Catron (1990)**

B.S. Marketing, Iowa State University (2013)

Financial planner, Vanguard (2022–present); investment servicing senior specialist, JPMorgan Securities (2019–2022); mortgage servicing specialist, Wells Fargo (2019)

**Nick Catsoules (1971)**

B.S. Business management, Arizona State University (1994)

M.B.A., Saint Edward's University (2003)

Manager, Vanguard (2019–present)

**George Breckinridge Cauffman (1991)**

B.S. Accounting and business administration, Washington and Lee University (2014)

Financial planner, Vanguard (2021–present); business development consultant, Citrine Power (2020–2021); financial analyst, CBRE (2019–2020)

**Joseph Caufield, CFP® (1981)**

B.A. Communications, The Pennsylvania State University (2004)

M.B.A., Drexel University (2016)

Manager, Vanguard (2019–present)

**Marc Everett Cavalier, CFP® (1992)**

B.A. International business and management, Dickinson College (2014)

Financial planner, Vanguard (2019–present)

**George A. Centeno, CFP® (1982)**

B.S. Personal financial planning, Texas Tech University (2005)

M.B.A., University of Nebraska–Lincoln (2010)

Manager, Vanguard (2019–present)

**Nikhil Chablani, CFP® (1987)**

B.A. Economics, University of Arizona (2011)

Financial planner, Vanguard (2019–present)

**Trent Chabot (1991)**

B.A. English literature, The University of North Carolina at Charlotte (2013)

M.A. English literature, Winthrop University (2016)

Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021); produce clerk, Lowes Foods (2020)

**Jessica Lynn Cecile Chancey, CFP® (1989)**

B.S. Finance, Arizona State University (2011)

Financial planner, Vanguard (2019–present)

**Praveen Chand, CFP® (1969)**

B.S. Accounting, University of Delhi, India (1990)

M.B.A. Finance, Philadelphia University (1993)

Financial planner, Vanguard (2019–present)

**Daniel Micah Chang, CFP® (1985)**

B.S.B.A., The University of North Carolina at Chapel Hill (2007)

Financial planner, Vanguard (2019–present)

**Jack Armand Chapel (1998)**

B.S. Finance, The University of Arizona (2020)

Financial planner, Vanguard (2022–present); financial advisor, Equitable Advisors (2020–2022); intern, Camelback Wealth Consultants (2019)

**Christopher John Charte, CFP® (1993)**

B.S. Business administration, Liberty University (2015)

Financial planner, Vanguard (2022–present); financial advisor, Selective Wealth Management (2020–2022); financial planner, Vanguard (2019–2020)

**Leslie Chatty, CFP® (1967)**

B.A. Psychology, Albright College (1990)

Financial planner, Vanguard (2019–present)

**Robert Joseph Cherry (1994)**

B.S. Finance and Economics, Grand Canyon University (2021)

Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); personal trainer, Fit Republic (2020); fitness advisor, In Shape (2019)  
*Outside activities:* Mr. Cherry is a host for Airbnb. Vanguard Advisers, Inc., has no affiliation with Airbnb, and Mr. Cherry's responsibilities do not conflict with his position at Vanguard.

**Chris Christian III, CFP® (1968)**

B.S.B.A. Business, University of Louisville (1992)

M.B.A. Finance and Accounting, Marquette University (2004)

Financial planner, Vanguard (2019–present)

**Sean Christy (1999)**

B.B.A. Finance, Stephen F. Austin State University (2021)

M.B.A., Stephen F. Austin State University (2022)

Financial planner, Vanguard (2024–present); financial advisor development program, Vanguard (2023–2024); intern, BXS Insurance (2022); student advisor, Marleta Chadwick Student Advisors (2021–2022); salesman, Fishing Tackle Unlimited (2019)

**Matthew Daniel Ciaglia, CFP® (1973)**

B.S.B.A. Business management, The University of North Carolina at Charlotte (1996)  
Financial planner, Vanguard (2021–present); independent insurance agent/owner, Looking Forward Financial, LLC (2020–2021); insurance specialist, Truist Financial (2019–2020)

**Caterina Mary Ciarlante (1964)**

Saint Joseph's University (1988, non-degree)  
Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021); assigned representative, Vanguard (2019)

**John Ciavarelli (1988)**

B.S. Business administration, Drexel University (2012)  
Financial planner, Vanguard (2021–present); retirement specialist, Vanguard (2020–2021); client service specialist, Vanguard (2019–2020); client service associate, WSFS Wealth Investments (2019); driver, Uber Technologies, Inc. (2019)

**John Cinalli, CFP® (1968)**

B.S. Business administration, Drexel University (1991)  
Financial planner, Vanguard (2019–present)

**Stephen Civile, CFP® (1964)**

B.S. Business management, Western Governors University (2017)  
Manager, Vanguard (2019–present); supervisor, Vanguard (2019)

**Catherine M. Clark, CFP® (1965)**

B.A. Interdisciplinary studies, Governors State University (2012)  
M.S. Finance, DePaul University (2016)  
M.B.A. Strategic leadership, University of Illinois (2019)  
Financial planner, Vanguard (2021–present); executive wealth strategist, Blue Lotus Strategies (2019–2021); financial consultant, Charles Schwab, Inc. (2019)

**Steven Michael Clarke, CFP® (1986)**

B.S. Personal financial planning, University of Missouri (2010)  
Financial planner, Vanguard (2019–present); wealth management advisor, TIAA (2019)

**Matt Clarkson, CFP® (1984)**

B.S. Retailing and consumer sciences, The University of Arizona (2007)  
Financial planner, Vanguard (2019–present); investment administrator, Vanguard (2019)

**Wilson Scott Clines, CFP® (1978)**

B.S.B.A. Finance, Northern Arizona University (2003)  
Financial planner, Vanguard (2019–present)

**Tom Coakley, CFP® (1979)**

B.S. Finance, The University of Vermont (2001)  
Financial planner, Vanguard (2019–present)

**Juliana Coates (1985)**

B.S. French and Biology, The State University of New York at Albany (2007)  
M.B.A., The State University of New York at Albany (2017)  
Financial planner, Vanguard (2022–present); financial analyst, Goldman Sachs (2019–2022); member service leader, SEFCU (2019)  
*Outside activities:* Ms. Coates is an owner of rental property. Vanguard Advisers, Inc., has no affiliation with the rental property, and Ms. Coates' responsibilities do not conflict with her position at Vanguard.

**Jason Matthew Cockerham, CFP® (1977)**

B.S. Finance, The Pennsylvania State University (1999)  
Financial planner, Vanguard (2019–present)

**Timothy Cody (1974)**

B.S. Economics, University of Wisconsin–Madison (1997)  
Manager, Vanguard (2021–present); manager, Ally Invest (2020–2021); financial solutions advisor, Merrill Lynch (2020); branch manager, TD Ameritrade (2019)

**Benjamin D. Cohen, CFP® (1976)**

B.A. Political science, West Virginia University (1998)  
Financial planner, Vanguard (2019–present)

**Eli Cohen, CFP® (1978)**

B.A. English, The George Washington University (2001)  
Financial planner, Vanguard (2021–present); financial consultant, Fisher Investments (2019–2021)

**Dante Pasquale Colarusso (1997)**

B.S.B.A. Finance, University of Pittsburgh (2020)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); performance analyst, Bank of New York Mellon (2020–2022); associate, Costco Wholesale (2020); resident assistant, University of Pittsburgh (2019–2020); associate, Target (2019–2020); wealth management trust tax intern, PricewaterhouseCoopers (2019)

**Andy Coleman, CFP® (1974)**

B.A. Psychology, The University of North Carolina at Chapel Hill (1996)  
Financial planner, Vanguard (2019–present)

**Michael Collegeman, CFP® (1991)**

B.S. Finance and Business economics, Indiana University (2013)  
Financial planner, Vanguard (2021–present); internal auditor, AIG, Inc. (2019–2021); associate financial advisor, LifeWorth Financial (2019)

**John P. Collins (1956)**

B.S. Economics, Rockford University (1980)  
Financial planner, Vanguard (2020–present); national key accounts director, Oberweis Asset Management (2019)

**Shane Collins, CFP® (1978)**

B.S. Business administration, Truman State University (2001)  
Financial planner, Vanguard (2019–present)

**Lynda Commale (1973)**

B.S. Psychology, Saint Joseph's University (1996)  
M.S. Organization development and change, The Pennsylvania State University (2024)  
Manager, Vanguard (2024–present); continuous improvement coach, Vanguard (2021–2024); manager, Vanguard (2019–2021)

**Brian Concannon (1988)**

B.A. Finance, La Salle University (2010)  
M.B.A., London Business School (2017)  
Principal, Vanguard (2023–present); department head, Vanguard (2019–2023)

**Carole Connolly, CFP® (1957)**

B.A. French and Psychology, Ohio Wesleyan University (1979)  
Financial planner, Vanguard (2019–present)  
*Outside activities:* Ms. Connolly is an owner of rental property. Vanguard Advisers, Inc., has no affiliation with the rental property, and Ms. Connolly's responsibilities do not conflict with her position at Vanguard. Ms. Connolly is the executrix for an estate. Vanguard Advisers, Inc., has no affiliation with the estate, and Ms. Connolly's responsibilities do not conflict with her position at Vanguard.

**Kara Connolly (2000)**

B.S. Finance, The University of Arizona (2021)  
Financial planner, Vanguard (2023–present); specialty flex associate, Vanguard (2022–2023); operations intern, Charles Schwab (2021); management trainee intern, Enterprise Rent-a-Car (2020–2021); server, Enclave Senior Living at Anthem (2020); server and shift lead, Sauce Pizza and Wine (2019–2020)

**Malachi Jake Conyers III, CFP® (1975)**

B.S. Finance, University of South Carolina (2002)  
Financial planner, Vanguard (2019–present)

**Easton Mark Cook (1989)**

B.S. Business, University of Phoenix (2014)  
Financial planner, Vanguard (2019–present)

**Jamie Ryan Cook, CFP® (1981)**

B.S. Business administration, Elizabethtown College (2004)  
Financial planner, Vanguard (2019–present)

**Jude Samuel Cooke, CFP® (1987)**

B.S. Management, United States Military Academy (2010)  
M.B.A., Oklahoma State University (2015)  
Financial planner, Vanguard (2021–present); regional director of business development, Lockwood Advisors (2019–2021)

**Frank J Cordova Jr., CFP® (1995)**

B.B.A. Finance and Management, New Mexico State University (2018)  
Financial planner, Vanguard (2022–present); client representative, Vanguard (2020–2022); manager, MCF Construction, Inc. (2019)

**Charles B. Cornner, CFP® (1971)**

B.M. Vocal arts, California State University, Northridge (1994)  
M.M. Music education, Arizona State University (1997)  
Financial planner, Vanguard (2019–present)  
*Outside activities:* Mr. Cornner is a choir director at Cross of Christ Lutheran Church. Vanguard Advisers, Inc., has no affiliation with Cross of Christ Lutheran Church, and Mr. Cornner's responsibilities do not conflict with his position at Vanguard.

**Kristen Cortez (1985)**

B.S. Tourism and hospitality management, Temple University (2008)  
M.B.A., The Pennsylvania State University (2010)  
Manager, Vanguard (2023–present); chief of staff, Vanguard (2022–2023); supervisor, Vanguard (2021–2022); client service representative, Vanguard (2019–2021)

**Timothy Ray Cosby Jr., CFP® (1999)**

A.S. Business administration, J. Sargeant Reynolds Community College (2017)  
B.S. Finance, Virginia Tech (2021)  
B.S. Management, Virginia Tech (2021)  
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); advice intern, Randstad (2020); marketing intern, iScholars (2019–2020); college financial representative, Northwestern Mutual (2019); men's merchandise associate, Marshalls (2019)

**Zachary Andrew Costagliola, CFP® (1993)**

B.S.B.A. Business administration, High Point University (2016)  
Financial planner, Vanguard (2019–present)

**Kyle Robert Cooney (1999)**

B.A. Economics, University of South Carolina (2021)  
M.A. Economics, University of South Carolina (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); financial analyst intern, G3 Wealth Advisors (2021–2022); supervisor, Cape Resorts (2019–2020)

**Jeffrey Paul Corser, II (1999)**

B.B.A., Roanoke College (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); federal and state tax consultant, Sonoco (2021); student assistant, Roanoke College (2019)

**Fiona Coupe, CFP® (1996)**

B.S. Consumer science, The University of Alabama (2018)  
M.S. Financial planning, The University of Alabama (2018)  
Financial planner, Vanguard (2019–present); financial advisor development program, Vanguard (2019)



**Matthew Gerald Covelli, CFP® (1989)**

B.S. Personal financial planning, Texas Tech University (2013)

M.S. Personal financial planning, Texas Tech University (2013)

Financial planner, Vanguard (2022–present); senior financial planner, RGT Wealth Advisors (2019–2022); financial planner, RGT Wealth Advisors (2019)

**Conner Paul Covington (1998)**

B.S. Agricultural economics, Texas A&M University (2020)  
Financial planner, Vanguard (2022–present); advisor support group representative, Vanguard (2021–2022); glazier technician, American Glass Company (2021); student worker, Texas A&M University (2020); sales intern, John Hancock Investment Management (2020); cashier, Rudy's Bar-B-Q (2019)

**Jonathan Admiral Covington (1986)**

B.S. Aerospace and Mechanical engineering, Oklahoma State University (2010)

Financial planner, Vanguard (2022–present); financial advisor, 49 Financial (2019–2022); financial analyst, 49 Financial (2019–2021); construction contractor, The Chatham Collective (2019)

**Robert Taylor Cox, CFP® (1993)**

B.S. Technical management, DeVry University (2016)  
Financial planner, Vanguard (2021–present); investment operations specialist, Ronald Blue Trust (2019–2021)

**Jacqueline V. Coyne, CFP® (1991)**

B.A. Economics, Rutgers State University of New Brunswick (2013)

M.B.A., Villanova University (2017)

Financial planner, Vanguard (2019–present)

**Kristin Leigh Cranford, CFP® (1988)**

A.S. Business administration, York Technical College (2015)

B.S. Business administration, Winthrop University (2015)

Financial planner, Vanguard (2020–present); client case representative, Vanguard (2019–2020); inheritance consultant, Vanguard (2019) bartender, Akahana Asian Bistro (2019)

**Austin B. Crass, CFP® (1989)**

B.S. Consumer and family financial services, The Ohio State University (2012)

M.B.A., Wake Forest University (2017)

Financial planner, Vanguard (2019–present)

**Jarrold Paul Crawford, CFP® (1982)**

B.A. Telecommunications, Baylor University (2005)

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Financial planner, Vanguard (2023–present), private wealth advisor, Wave Wealth Management (2019–2023)

**Boomer Creed (1983)**

B.S. Psychology, Clemson University (2006)

Manager, Vanguard (2023–present); lean specialist, Vanguard (2019–2023); supervisor, Vanguard (2019)

**Devon Alexander Cristales (1994)**

Monroe Community College (Fall 2018 and Spring 2019, non-degree)

B.S. Management, Arizona State University (2022)

Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); business development representative intern, Axway (2022); work study, Pat Tillman Veterans Center (2020–2022); sales associate, Guess Inc. (2019–2020); patient care technician, Rochester Regional Health (2019); cook and bartender, Embark Craft Ciderworks (2019)

**John Cronin, CFP® (1970)**

B.A. Finance, Temple University (1992)

M.B.A. Marketing, Temple University (2000)

Financial planner, Vanguard (2021–present); business development director, SEI Investments (2019–2021)

**Andrew J. Crosby, CFP® (1987)**

A.A. English, Mesa Community College (2007)

B.L.S. English and Political science, Arizona State University (2010)

Financial planner, Vanguard (2020–present); lead financial coach, My Financial Coach (2019–2020); financial planning consultant, Northwestern Mutual (2019)

**Joseph Benjamin Crosby III, CFP® (1993)**

B.A. Corporate communication, Duquesne University (2015)

Financial planner, Vanguard (2019–present); operations service administrator, Vanguard (2019); investment professional, Vanguard (2019)

**Adam Christopher Curette, CFP® (1972)**

B.A. English literature, Pfeiffer University (1994)

Financial planner, Vanguard (2019–present)

**Andrew John Curran (2000)**

B.S. Finance, Virginia Tech (2022)

Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); advice intern, Randstad (2021); landscaper, Eastern Terrain Landscaping (2019–2020)

**Catherine Lally Curran, CFP® (1995)**

B.A. English, Haverford College (2017)

Financial planner, Vanguard (2019–present); operations service administrator, Vanguard (2019); investment professional, Vanguard (2019)

**Alfred Current (1988)**

B.S. Criminal justice, Appalachian State University (2014)

Manager, Vanguard (2021–present); senior associate, Vanguard (2020–2021); brokerage investment professional, Vanguard (2019–2020)

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**David Curtis, CFP® (1985)**

B.S. Marketing management, Bob Jones University (2007)

Financial planner, Vanguard (2019–present)

**Glen Curtis, CFP® (1969)**

B.S. Business administration, Geneva College (1991)  
Financial planner, Vanguard (2019–present)

**Matthew Alex Czerw (2000)**

B.S. Finance and Risk management and insurance, University of South Carolina (2022)

Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); driver, DoorDash (2022); shopper, Instacart (2021–2022); project management intern, Chubb (2021); pizza delivery driver, Nicholas Pizza (2021); college financial representative, Northwestern Mutual (2020); worker, Ercolanus Plant Nursery (2019); pizza delivery driver, Frank's Pizza (2019)

**Urszula Dabrowski, CFP® (1976)**

B.B.A. Business administration, Baruch College (2007)  
M.B.A. Leadership, Grand Canyon University (2013)  
Manager, Vanguard (2019–present)

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**Jonathan Daines (1999)**

B.S. Business administration, Winthrop University (2022)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); advice intern, Randstad (2021); associate trainer, Panera Bread Company (2019–2022)

**Matthew Dalo (1995)**

B.S. Finance, The Pennsylvania State University (2018)  
Financial planner, Vanguard (2022–present); retirement sales consultant, Vanguard (2020–2022); investment services representative, Vanguard (2019–2020); client relationship associate, Vanguard (2019)

**Drake Dalton, CFP® (1995)**

B.S. Personal financial planning, Utah Valley University (2021)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); workplace planning consultant, Fidelity Investments (2021–2022); sales representative, Moxie Pest Control (2019–2021); account manager intern, TrueNorth Wealth (2019)

**Michael Dalton (1997)**

B.S.B.A. Finance, Elon University (2019)  
Financial planner, Vanguard (2021–present); inheritance administrator, Vanguard (2020–2021); client relationship associate, Vanguard (2019–2020); intern, Metro Landmarks LLC (2019)

**Michael Daly, CFP® (1990)**

B.S.B.A. Marketing, King's College (2013)  
Financial planner, Vanguard (2019–present)

**Nathan Daniel (1997)**

B.S. Applied health science, Messiah University (2020)  
Financial planner, Vanguard (2024–present); advance to financial planning associate, Vanguard (2023–2024); client relationship associate, Vanguard (2021–2023); physical therapy support specialist, Concentra (2019–2020)

**Jesse Danielson, CFP® (1992)**

B.A. Economics, Wheaton College (2015)  
Financial planner, Vanguard (2021–present); investment portfolio associate, Raymond James and Associates (2019–2020); registered staff member, D.K. Brede Investment Management (2019)

**Sarah Courtney Danna, CFP® (1976)**

B.S. Business management, University of Phoenix (2004)  
M.B.A., University of Phoenix (2006)  
Financial planner, Vanguard (2019–present)

**Matthew N. D'Antonio, CFP® (1966)**

B.S. Business management, York College of Pennsylvania (1989)

Financial planner, Vanguard (2020–present); relationship manager, Vanguard (2019–2020)

**Michael D'Antonio, CFP® (1994)**

B.S. History, University of Delaware (2016)  
Manager, Vanguard (2022–present); navigator, Vanguard (2020–2022); supervisor, Vanguard (2019–2020); financial planner, Vanguard (2019)

**Hinnah Daryani, CFP® (1993)**

B.A. Economics and administrative studies, University of California, Riverside (2020)  
Financial planner, Vanguard (2020–present); relationship management and sales consultant, Vanguard (2019–2020); investment professional, (2019)

**Shawn Matthew Goheen Dassel, CFP® (1980)**

B.S. Criminal justice, University of Delaware (2004)  
Financial planner, Vanguard (2024–present); relationship manager, Vanguard (2019–2024)

**Brian Michael Davis, CFP® (1989)**

B.S. Finance, The University of Arizona (2012)  
Financial planner, Vanguard (2019–present)

**Daniel Davis, CFP® (1983)**

A.S. Business management, Quincy College (2009)  
B.S. Business administration, New England College of Finance (2012)  
Financial planner, Vanguard (2019–present)

**Christopher Jeremy Leith Davis-Slade, CFP® (1973)**

B.F.A. Design, Syracuse University (1991)  
M.A.F. Wealth management, Macquarie University (2012)  
Financial planner, Vanguard (2022–present); internal sales executive, Vanguard (2019–2022); relationship manager, Vanguard (2019)

**Aditi A. Dayal, CFP® (1974)**

B.B.A. Finance and International business administration, Temple University (2002)  
Financial planner, Vanguard (2022–present); investment consultant, Vanguard (2020–2022); retirement sales consultant, Vanguard (2019–2020)

**Michael G. Dearborn, CFP® (1981)**

B.A. Sociology and Human communication, Arizona State University (2005)  
M.Div. Leadership development, Phoenix Seminary (2010)  
Financial planner, Vanguard (2020–present); client consultant, Vanguard (2019–2020); client solutions specialist, Vanguard (2019)

**Jesse D'Elia, CFP® (1989)**

B.S. Education, Millersville University (2011)  
Financial planner, Vanguard (2020–present); specialty consultant, Vanguard (2019–2020); relationship manager, Vanguard (2019)

**Gianni De La Cruz, CFP® (1990)**

B.A. Financial planning, DePaul University (2018)  
Financial planner, Vanguard (2019–present)

**Kevin Joseph Decker, CFP® (1985)**

B.A. Finance, Michigan State University (2008)  
Financial planner, Vanguard (2019–present)

**Christopher J. Dede, CFP® (1978)**

B.S.B.A Management, University of South Dakota (2001)  
Financial planner, Vanguard (2021–present); relationship manager, Charles Schwab (2019)

**Richard John DeFrancesco, CFP® (1989)**

B.S. Economics, Arizona State University (2011)  
Financial planner, Vanguard (2019–present)

**Seth DeGeer, CFP® (1975)**

B.S. Finance, Arizona State University (1998)  
M.B.A. University of Phoenix (2001)  
Manager, Vanguard (2019–present)

**Josephine Regeic Del Duca, CFP® (1966)**

B.A. English, Colby College (1988)  
M.B.A., University of Delaware (1997)  
M.S.Ed. Education, University of Pennsylvania (2007)  
Financial planner, Vanguard (2021–present); client care case manager, Vanguard (2020–2021); financial processor, Randstad (2019–2020); teacher, Sacred Heart Academy (2019)

**Neil DeLucca (1984)**

B.S. Marketing, Temple University (2008)  
Financial planner, Vanguard (2022–present); investment consultant, Vanguard (2020–2022); account transition specialist, Vanguard (2019–2020)

**Dennis J. Del Valle, CFP® (1969)**

B.S. Finance, Saint John's University (1996)  
Financial planner, Vanguard (2019–present)

**Candace L. Delaney, CFP® (1986)**

B.S. Finance and Banking, Appalachian State University (2008)  
M.B.A., Elon University (2013)  
Financial planner, Vanguard (2019–present)

**Nick DelVecchio, CFP® (1989)**

B.S. Finance and Management, University of South Carolina (2012)  
Financial planner, Vanguard (2019–present)

**Beau Denhalter (1999)**

B.S. Finance, Utah State University (2021)  
B.S. Management, Utah State University (2021)  
Financial planner, Vanguard (2022–present); specialty flex associate, Vanguard (2021–2022); teacher's assistant, Utah State University (2019–2021); coach, Codo's Coaching (2019–2021); delivery driver, Domino's Pizza (2019–2021); Small Enterprise Education and Development ambassador, Utah State University (2019)

**Carly Denial (1998)**

B.S. Finance, Northern Arizona University (2020)  
Financial planner, Vanguard (2023–present); advisor support representative, Vanguard (2020–2023); investment services representative, Vanguard (2020); recreation department associate, Forest Highlands (2019–2020); bartender and server, The Mayor (2019–2020)

**Larry Denney, CFP® (1975)**

B.S. Finance, DeSales University (2016)  
B.A. Business administration, DeSales University (2016)  
M.B.A. Accounting, DeSales University (2021)  
Financial planner, Vanguard (2019–present)

**Trenton Alexander Derrick (1995)**

B.S.B.A. Finance, The University of North Carolina at Charlotte (2017)  
Financial planner, Vanguard (2020–present); client associate, Vanguard (2019–2020); investment professional, Vanguard (2019)

**Anthony DeSante, CFP® (1968)**

B.A. History, The University of Scranton (1990)  
Financial planner, Vanguard (2019–present)

**Hannah Desher, CFP® (1994)**

B.S. Finance, Temple University (2017)  
Financial planner, Vanguard (2021–present); associate planner, Radnor Financial Advisors (2019–2021)

**Brooks Desjardins, CFP® (1990)**

B.S.B.A. Finance, University of Pittsburgh (2012)  
Financial planner, Vanguard (2019–present)

**Chase Deters, CFP® (1983)**

B.A. Economics/Business management, Hope College (2004)  
Financial planner, Vanguard (2019–present)

**Matthew Devenney, CFP® (1990)**

B.A. Finance and Economics, West Chester University (2012)  
Financial planner, Vanguard (2020–present); investment administrator, Vanguard (2019–2020)

**Rafael Josue Diaz, CFP® (1982)**

B.A. Communications, The University of North Carolina at Chapel Hill (2005)  
Financial planner, Vanguard (2021–present); retirement sales consultant, Vanguard (2019–2021); retirement sales specialist, Vanguard (2019)

**Charles M. Dickinson, CFP® (1971)**

B.S. Marketing, Arizona State University (2003)  
Financial planner, Vanguard (2019–present)

**Jaymes Matthew Dickinson, CFP® (1977)**

B.S. Business, Arizona State University (1999)  
M.B.A. Finance, Arizona State University (2004)  
Financial planner, Vanguard (2019–present)

**Dahr Shaun Dietrich (1982)**

B.S. Business finance, Arizona State University (2008)  
Manager, Vanguard (2019–present)

**Andrew Dilks, CFP® (1984)**

B.S. Business administration, Albright College (2013)  
M.B.A, Saint Joseph's University (2017)  
Financial planner, Vanguard (2020–present); corrections and reversals supervisor, SEI Investments (2019–2020)

**Benjamin Alexander Dillon (1996)**

B.A. Criminal justice, Monmouth University (2018)  
Financial planner, Vanguard (2023–present); client relationship associate, Vanguard (2021–2023); manager, La Dolce Vita (2019–2021); server/manager, La Dolce Vita (2019–2021); server/manager, Catelli Duo (2019–2020); intern, New Jersey Superior Court–Burlington County (2019)

**Sydney DiNatale (2000)**

B.S. Finance, The University of Alabama (2021)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); sales intern, Adams-Martin Allstate (2021–2022); loan officer assistant, First Federal Bank (2020–2021); bank teller, Eastern Bank (2019–2021); faculty scholar, The University of Alabama (2019–2020); server, Lookout Rooftop Bar (2021); server, Side by Side Kitchen & Cocktails (2021)

**Nicholas Anthony DiPrinzio, CFP® (1995)**

B.S. Finance, Temple University (2018)  
B.S. Financial planning, Temple University (2018)  
Financial planner, Vanguard (2019–present); financial advisor development program, Vanguard (2019)

**Brock Adam Dittmer, CFP® (1990)**

B.S. Business management, Arizona State University (2013)  
Financial planner, Vanguard (2020–present); client service group consultant, Vanguard (2019–2020); assigned representative, Vanguard (2019)

**Conchita N. Dixon (1975)**

B.S. Accounting, The Pennsylvania State University Erie – The Behrend College (1997)  
M.S. Taxation and financial planning, Widener University (2008)  
Financial planner, Vanguard (2021–present); financial consultant, TIAA (2019–2020)

**Thomas Dohogne (1998)**

B.S. Finance, Grand Canyon University (2020)  
Financial planner, Vanguard (2021–present); financial advisor, Equitable Advisors (2020–2021)

**William Daniel Dollar (1999)**

B.S. Business management, University of North Carolina Asheville (2021)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); house sitter, self-employed (2022); analyst, JacksonKate Trading, LLC. (2020–2022); financial consultant, House of Brandstracts, Inc. (2021–2022); dishwasher and prep cook, Avenue M (2019–2020); mentor, McRorie-Williams (2019)

**Michael J. Donaghey, CFP® (1967)**

B.S. Mechanical engineering technology, University of Dayton (1989)  
Financial planner, Vanguard (2019–present)

**James Donahue, CFP® (1996)**

A.S. Finance, Parkland College (2016)  
B.S. Financial planning, University of Illinois at Urbana-Champaign (2018)  
Financial planner, Vanguard (2019–present); financial advisor development program, Vanguard (2019)

**Patrick Donovan (1981)**

A.S. Communications, Montgomery County Community College (2003)  
B.A. English literature, West Chester University (2006)  
Financial planner, Vanguard (2022–present); financial advisor, Ameriprise Financial (2020–2022); general manager, Regal Cinemas (2019–2021)

**Thomas Dougherty, CFP® (1992)**

B.S. Marketing, Saint Francis University (2016)  
Financial planner, Vanguard (2019–present); account transition specialist, Vanguard (2019)

**Benjamin Dourte, CFP® (1974)**

B.S. Business administration, Messiah College (1997)  
Financial planner, Vanguard (2019–present)

**Michael Weston Dove (2000)**

B.S. Finance, Virginia Tech (2022)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); remote mutual fund co-op, Edward Jones (2021); musician on streaming and online services, self-employed (2020–2021); contact driver for DoorDash, self-employed (2020–2021); barista, EspressoOasis (2019–2020); associate, Taste Unlimited (2019); intern, Trinity Church (2019)

**Heath Dowell, CFP® (1981)**

B.B.A Finance, The University of Texas at Arlington (2007)  
Manager, Vanguard (2021–present); branch manager, TD Ameritrade (2019–2021)

**Craig Doyon, CFP® (1974)**

B.A. History, Western Connecticut State University (1996)  
Financial planner, Vanguard (2019–present)

**Scott Drahzal, CFP® (1976)**

B.S. Finance, Rochester Institute of Technology (1998)  
Financial planner, Vanguard (2019–present)



**Mark Druckenmiller, CFP® (1975)**

B.S. Management and Accounting, Millersville University (1998)

M.B.A. Finance, Lehigh University (1999)  
Financial planner, Vanguard (2019–present)

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**James Duchene, CFP® (1956)**

B.S. Chemical engineering, Grove City College (1979)

M.S. Finance, University of Houston (1985)  
Financial planner, Vanguard (2019–present)

**April Duhigg, CFP® (1972)**

B.A. Communications, Auburn University (1996)

Financial planner, Vanguard (2019–present)

**Matthew Duliba, CFP® (1987)**

B.A. Public policy, Hobart College (2009)

Financial planner, Vanguard (2019–present)

**Jacob Dunn (2001)**

B.S. Financial counseling and planning, Purdue University (2022)

Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); guest experience ambassador, Hornets Sports and Entertainment (2022–2023); golf course attendant, Tipton Municipal Golf Course (2022); member services manager, Purdue Recreation and Wellness (2020–2022); private wealth intern, First Merchants Bank (2021); sales intern, AgReliant Genetics (2020); street department helper, City of Tipton (2019)

**James Dunn, CFP® (1969)**

B.S. Business management, Rutgers University (1992)

M.B.A. Finance, Rutgers University (2002)  
Financial planner, Vanguard (2019–present)

**Andrew Wade DuPont, CFP® (1974)**

Collin College (1992–1993, non-degree)

Financial planner, Vanguard (2023–present); branch manager, TD Ameritrade (2019–2021)

**Karen M. Durkin, CFP® (1956)**

B.S. Foods and nutrition, University of Illinois (1978)

Financial planner, Vanguard (2019–present)

**Abram Doyle Early III, CFP® (1974)**

B.A. Sociology, Wake Forest University (1996)

Financial planner, Vanguard (2019–present)

**Andrew Evan Eastland, CFP® (1998)**

B.A. Economics, Davidson College (2021)

Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); winter analyst, Tobin & Company Investment Banking Group (2020–2021); logistics planning analyst, Blue Ribbon Transport (2020); innovation center front desk associate, Davidson College (2019–2021)

**Leon Edelman, CFP® (1986)**

B.A. Economics and Global religions, Moravian University (2009)

Manager, Vanguard (2021–present); project manager, Vanguard (2019–2021); project specialist, Vanguard (2019)

**Julie B. Edwards, CFP® (1971)**

B.A. Psychology, University of Delaware (1993)

Financial planner, Vanguard (2019–present)

**Steven Edwards, CFP® (1997)**

B.S. Finance, The University of Alabama (2019)

Financial planner, Vanguard (2021–present); client representative, Vanguard (2019–2021); department manager, Mountain High Outfitters (2019)

**Jenna Egan (2000)**

B.S. Financial planning and wealth management, University of Delaware (2022)

Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); financial planning resident, Benchmark Financial LLC (2021–2022); soccer coach, DKS Sports Development LLC (2022); bartender/server, Randolph Bar and Grill (2019–2022)

**John T. Egan III, CFP® (1991)**

B.S. Finance, Saint Joseph's University (2013)

B.S. Financial planning, Saint Joseph's University (2013)

Financial planner, Vanguard (2019–present)

**Thomas Christopher Egan, CFP® (1972)**

B.S. Business, Delaware Valley College (2001)

M.B.A., Delaware Valley College (2010)

Financial planner, Vanguard (2022–present); relationship manager, Vanguard (2019–2022)

**Thomas Edward Egan (1997)**

B.S. Finance, The College of New Jersey (2020)

Financial planner, Vanguard (2022–present); client case representative, Vanguard (2021–2022); client representative, Vanguard (2020–2021); financial professional, Karr Barth Associates (2020); wealth management intern, Morgan Stanley (2019); finance intern, Stokes Creative Group (2019)

**Cody Alan Eggers (1994)**

B.S. Business administration, Wheeling Jesuit University (2017)

Financial planner, Vanguard (2020–present); retirement specialist, Vanguard (2019–2020)

**Christine Anne Eichorn (1961)**

B.S. Arts and letters, Portland State University (1999)

Financial planner, Vanguard (2023–present); client case representative, Vanguard (2021–2023); brokerage investment professional, Vanguard (2019–2021); client relationship associate, Vanguard (2019)

**Melissa Einberg, CFP® (1965)**

B.A. Economics, Brandeis University (1986)

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Financial planner, Vanguard (2019–present)

**Ivan Eiraldi, CFP® (1983)**

B.A. International relations and Political science, The State University of New York College at Geneseo (2006)  
M.B.A., Villanova University (2018)  
Financial planner, Vanguard (2019–present)

**Timothy David Ellis II, CFP® (1990)**

B.S. Business finance, Financial services, East Carolina University (2013)  
Financial planner, Vanguard (2019–present)

**Violeta Emmanuel (1979)**

Pensacola Junior College (1999–2000, non-degree)  
Manager, Vanguard (2019–present)

**Jon Engleman, CFP® (1971)**

B.S. Business management, The Pennsylvania State University (1993)  
Financial planner, Vanguard (2019–present)

**Ian Matthew English, CFP® (1997)**

B.A. Economics and Spanish literature, Hillsdale College (2020)  
Manager, Vanguard (2022–present); emerging leader development program, Vanguard (2020–2022); head of student office workers, Hillsdale College (2019–2020); data analysis intern, Institute for Humane Studies (2019)

**Ryan Ennis, CFP® (1991)**

B.S. Marketing, Fordham University (2014)  
Financial planner, Vanguard (2024–present); relationship manager, Vanguard (2021–2024); sales consultant, Vanguard (2019–2021)

**Kelsey Ertmer, CFP® (1995)**

B.A. Finance, California State University, Fullerton (2017)  
Financial planner, Vanguard (2020–present); sales consultant, Vanguard (2019–2020); investment professional, Vanguard (2019)

**John Escudero (1977)**

B.S. Business administration, San Diego State University (2016)  
Financial planner, Vanguard (2023–present); sales consultant, Vanguard (2021–2023); client representative, Vanguard (2020–2021); retirement specialist, Vanguard (2019–2020)

**Joshua Harris Eskin (2000)**

B.A. Philosophy, politics and economics, University of Pennsylvania (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); summer intern, Levy Wealth Management Group (2021); intern, Eisenberg, Rothweiler, Winkler, Eisenberg & Jeck, P.C. (2020); summer intern, Primerica, Inc. (2020); summer intern, Cormis Partnership (2019); brand ambassador, Atlas College Marketing Group, Inc. (2019–2020); busser, Cantina Feliz (2019)

**Robert Michael Castillo Espinal, CFP® (1993)**

A.S. Business administration, Passaic County Community College (2015)  
B.S. Finance, Rutgers University (2018)  
Financial planner, Vanguard (2020–present); client representative, Vanguard (2019–2020); financial service representative, Merrill Lynch (2019)

**Christopher A. Esser, CFP® (1971)**

B.A. History, Bloomsburg University of Pennsylvania (1993)  
B.S. Education, Bloomsburg University of Pennsylvania (1994)  
Financial planner, Vanguard (2019–present)

**David Estrella, CFP® (1983)**

B.S. Criminal justice, West Chester University (2005)  
Financial planner, Vanguard (2019–present)

**Casey Lynn Ethier (1987)**

B.S. Business administration and Finance, University of the Pacific (2009)  
M.B.A., Drexel University (2017)  
Manager, Vanguard (2019–present)

**Christopher H. Evans, CFP® (1981)**

B.A. International relations, University of Southern California (2004)  
Financial planner, Vanguard (2019–present)

**Mark Evans, CFP® (1967)**

B.A. Accounting, Michigan State University (1990)  
M.T. Taxation, Villanova Law School (2001)  
M.B.A. Management, Saint Joseph's University (2008)  
Financial planner, Vanguard (2019–present)

**George Evdemon, CFP® (1963)**

B.A. Finance, University of South Florida (1985)  
M.B.A., Mercer University (1988)  
Financial planner, Vanguard (2019–present)

**John Eyen (1980)**

B.S. Management, The Pennsylvania State University (2003)  
Manager, Vanguard (2022–present); supervisor, Vanguard (2020–2022); client consultant, Vanguard (2019–2020); client relationship specialist, Vanguard (2019)

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Financial planner, Vanguard (2022–present); financial advisor, Merrill Lynch (2019–2020); financial advisor, Fidelity Investments (2019)

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B.S. Business administration, Appalachian State University (2014)  
Financial planner, Vanguard (2019–present)

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Manager, Vanguard (2019–present)

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Financial planner, Vanguard (2020–present); sales specialist, Vanguard (2019–2020)

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Financial planner, Vanguard (2021–present); financial advisor, Acorn Consulting Services (2019–2021)

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Financial planner, Vanguard (2022–present); client service associate, Vanguard (2020–2022); personal banker, Wells Fargo (2019–2020)

**Adam Finke (1999)**

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**Johnanthony J. Fiorilli Jr. (1998)**

B.S. Finance, The Pennsylvania State University (2020)

Financial planner, Vanguard (2022–present); orders client representative, Vanguard (2021–2022); client relationship associate, Vanguard (2020–2021); moderator, Distance CME LLC (2019–2020); referee, National Intercollegiate Soccer Officials (2019–2020); referee, United States Soccer Federation (2019–2020)

**Alex Cameron Fish, CFP® (1989)**

B.S. Communication, Utah Valley University (2016)

M.S. Personal financial planning, Texas Tech University (2018)

Financial planner, Vanguard (2019–present); financial advisor development program, Vanguard (2019)

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B.S. Finance, The University of Arizona (2008)

Financial planner, Vanguard (2020–present); retirement income specialist senior, USAA (2020); wealth advisor senior, USAA (2019–2020)

**William Dorrington Fisher, CFP® (1996)**

B.S.B.A. Finance, Western Carolina University (2019)

Financial planner, Vanguard (2022–present); financial advisor, Edward Jones (2020–2022); financial advisor career and development trainee, Edward Jones (2019–2020); member service representative, Mountain Credit Union (2019); production crew, The Bardo Arts Center (2019); crew member, The Liston B. Ramsey Activity Center (2019)

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B.S. Justice studies, Arizona State University (2006)

Financial planner, Vanguard (2019–present)

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B.S. Finance and Financial planning and wealth management, John Carroll University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); financial planning intern, Wealth Advocate Group (2021); manual laborer, Dependable Scaffolding, LLC (2020–2021); caddie, Shaker Country Club (2021); caddie, Canterbury Country Club (2020); caddie, Westwood Country Club (2019–2020); lifeguard, Westwood Country Club (2019)

**Patrick Flynn (1992)**

B.S. Athletic training, West Chester University (2014)  
Financial planner, Vanguard (2021–present); financial services representative, TD Bank, N.A. (2019–2021); financial representative, Northwestern Mutual (2019)

**Corey James Ford (1993)**

Financial planner, Vanguard (2021–present); server, Snooze Eatery (2020–2022); financial services professional, New York Life (2020–2021); bartender, Sanchos Cantina (2019–2021)

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B.A. Liberal arts, West Chester University (2009)  
Manager, Vanguard (2019–present); assigned representative, Vanguard (2019)

**James Bently Forker, CFP® (1994)**

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Financial planner, Vanguard (2021–present); financial planner, Wise Planning, Inc. (2019–2021); senior financial advisor, Union Bank (2019)

**Joseph Anthony Fosco (1987)**

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Financial planner, Vanguard (2021–present); operations specialist, Vanguard (2019–2020)

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B.A. Geography, San Diego State University (1988)  
Financial planner, Vanguard (2019–present)

**Gavin Fox (1999)**

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Financial planner, Vanguard (2022–present); financial advisor, McAdam Financial (2021–2022); finance intern, PTC (2019)

**JenaMarie Fox, CFP® (1984)**

B.S. Business administration, Marquette University (2006)  
Financial planner, Vanguard (2019–present)

**Paul P. Fox (1963)**

B.A. History, University of Illinois at Chicago (1988)  
M.P.A., The University of Arizona (2001)  
Financial planner, Vanguard (2019–present)

**Eric Ray Francis, CFP® (1986)**

B.S. Business management, University of Phoenix (2012)  
Financial planner, Vanguard (2022–present); financial planning director, Morgan Stanley (2021–2022); wealth management trainer, Morgan Stanley (2019–2021); owner, Good Samaritan Realty & Financial Planning (2019); financial advisor, Dentist Advisors (2019)

**Mary A. Franks, CFP® (1965)**

A.A.S. Chemical engineering, SUNY Broome Community College (1985)  
Financial planner, Vanguard (2019–present)

**Ross David Fraser, CFP® (1994)**

B.A.S. Supervision and management, Daytona State College (2017)  
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**Sarah Fremin, CFP® (1996)**

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Financial planner, Vanguard (2020–present); retirement specialist, Vanguard (2019–2020); client relationship specialist, Vanguard (2019)

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Financial planner, Vanguard (2019–present)

**Jonathan Friend, CFP® (1979)**

B.A. Spanish, Brigham Young University (2004)  
Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2019–present)

**Audrey Nichole Fuga (2000)**

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Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); server, Country Club of Detroit (2021); driver, DoorDash (2019–2020); receptionist, PLAY (2019–2020); administrative assistant, General Surveillance, Inc. (2019)

**Samuel Fulbright (1999)**

B.S. Finance, The University of North Carolina at Charlotte (2021)  
Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); event specialist, On24 (2019–2021); customer service, Harris Teeter (2019–2020)

**Jay Fuller (1956)**

The University of Arizona (1974, non-degree)  
Financial planner, Vanguard (2022–present); financial advisor, Bankers Life Securities, Inc. (2022); president, Sound Wealth Management, LLC (2021–2022); financial advisor, Merrill Lynch (2020–2021); president, Sound Wealth Management, LLC (2019–2020)



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B.A. History, Kenyon College (1989)  
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Financial planner, Vanguard (2019–present)

**Sharnise N. Gadsden, CFP® (1977)**

B.S. Business administration, The Pennsylvania State University (2000)  
M.B.A., Rosemont College (2016)  
Financial planner, Vanguard (2019–present)

**Nicholas Gaetani, CFP® (1986)**

B.A. Political science, York College of Pennsylvania (2008)  
M.A. Geography and planning, West Chester University (2010)  
Financial planner, Vanguard (2022–present); financial advisor, Mallard Financial Partners (2019–2022); senior financial advisor, Capital One Investing (2019)

**Christopher Douglas Gaffney (1985)**

B.A. Political science, The University of North Carolina at Charlotte (2011)  
Financial planner, Vanguard (2022–present); client representative, Vanguard (2020–2022); registered representative, New York Life Insurance Company (2019–2020)

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B.S. Finance, Central Connecticut State University (2012)  
Financial planner, Vanguard (2019–present)

**Wesley Baker Gaines, CFP® (1979)**

B.A. Spanish, The University of North Carolina at Chapel Hill (2001)  
M.A. Spanish linguistics, The Pennsylvania State University (2005)  
Financial planner, Vanguard (2023–present); manager, Vanguard (2021–2023); senior trainer, Vanguard (2019–2021)

**Elisheba P. Gainey, CFP® (1969)**

B.S. Lab sciences and Cytogenetic technology, Thomas Jefferson University (1996)  
Financial planner, Vanguard (2019–present)

**Andrew Gaither (1985)**

B.A. Finance, University of South Carolina (2008)  
M.B.A., Wake Forest University (2022)  
Manager, Vanguard (2023–present); supervisor, Vanguard (2021–2023); financial planner, Vanguard (2019–2021); inheritance specialist, Vanguard (2019)

**Dana Galenski, CFP® (1984)**

B.S. Criminal justice, University of Central Florida (2007)  
Financial planner, Vanguard (2021–present); preferred advisor, Truist (2019–2021); premier banker, Wells Fargo (2019)

**Davide Galiano (1988)**

B.S.B.A., Università Carlo Cattaneo (2012)  
M.S. International business, Hult International Business School (2013)  
Financial planner, Vanguard (2021–present); financial solution advisor, Merrill Edge (2020); registered banker, Wells Fargo Advisors (2019–2020); business banker, Wells Fargo (2019–2020)

**Stephanie Galindo, CFP® (1997)**

B.S. Financial planning and Accounting, William Paterson University (2020)  
Financial planner, Vanguard (2021–present); financial advisor development program, Vanguard (2020–2021); cashier, TJX Companies (2019–2020)

**Andrew Michael Gallagher (1988)**

A.A.S. Business, Community College of Philadelphia (2009)  
B.B.A. Real estate, Temple University (2012)  
Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021)

**John Patrick Gallagher Jr., CFP® (1991)**

B.A. Global history, Washington & Lee University (2013)  
Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021)

**Joseph (Joe) A. Gallagher, CFP® (1978)**

B.A. Psychology, Rutgers University (2002)  
Financial planner, Vanguard (2019–present)

**Christopher Gallop, CFP® (1985)**

B.A. Economics, University of Alberta (2008)  
M.A. Community and regional planning, The University of British Columbia (2011)  
Financial planner, Vanguard (2022–present); client consultant, Vanguard (2021–2022); tax professional, H&R Block (2020–2021); server, Founding Farmers (2019–2021)

**Alvaro Galvez (1995)**

B.B.A. Finance, University of Georgia (2018)  
Financial planner, Vanguard (2022–present); client consultant, Vanguard (2020–2022); client case representative, Vanguard (2019–2020); client services representative, Vanguard (2019)

**Dale Gambell, CFP® (1971)**

B.S. Finance, Brigham Young University (1995)  
Financial planner, Vanguard (2021–present); wealth advisor, USAA (2019–2021)

**Nilay Gandhi, CFP® (1975)**

B.S. Food marketing, Saint Joseph's University (1997)  
M.S. Executive food marketing, Saint Joseph's University (2007)  
Financial planner, Vanguard (2019–present); associate, Kumud C. Gandhi, CPA (2019–present)  
*Outside activities:* Mr. Gandhi is an associate for Kumud C. Gandhi, CPA. Vanguard Advisers, Inc., has no affiliation with Kumud C. Gandhi, CPA, and Mr. Gandhi's responsibilities do not conflict with his position at Vanguard.

**Erwin Brent Gant (1964)**

B.S. Business administration, Widener University (1992)

M.B.A., Eastern University (1996)

Financial planner, Vanguard (2022–present); senior vice president, Legacy Advisors (2019–2022)

*Disciplinary information:* In 2015, the Pennsylvania Department of Banking issued a Consent Agreement and Order which found Erwin Gant and Gant Private Financial Management (“GPFM”), a sole proprietorship for which Mr. Gant acted as president and owner, to have violated the Pennsylvania Securities Act by failing to register as an investment adviser in Pennsylvania during the period from January 1, 2013, until April 24, 2013. GPFM engaged in the business of advising others for compensation, however, was not registered and was not exempt from registration with the State as an investment adviser. Mr. Gant and GPFM were ordered to pay an administrative assessment in the amount of \$5,296.64. See FINRA’s BrokerCheck for more information.

**Carter G. Garbutt, CFP® (1984)**

B.S.B.A. Finance and banking, Appalachian State University (2007)

Financial planner, Vanguard (2019–present)

**Andy Paul Garcia, CFP® (1975)**

B.S.B.A. Management information systems and Operations management, The University of Arizona (1998)

Financial planner, Vanguard (2019–present)

**Caleb M. Garcia, CFP® (1981)**

B.S. Aeronautics, Embry-Riddle Aeronautical University (2009)

M.B.A. Finance, University of Pittsburgh (2012)

Manager, Vanguard (2022–present); financial planner, Vanguard (2022); manager, Vanguard (2019–2022)

**George Frank Garcia (1999)**

B.S. Finance, Utah State University (2022)

B.S. Economics, Utah State University (2022)

Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); teaching assistant, Utah State University (2022); North American retail sales intern, General Mills (2021); green office manager intern, Utah State University (2020–2021); contractor, Your Employment Solutions (2020); sales intern, Peterson Worldwide (2019)

**Richard R. Garcia, CFP® (1969)**

B.S. Business administration, University of Phoenix (2010)

Financial planner, Vanguard (2019–present)

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B.S. Accounting, West Chester University (2009)

Financial planner, Vanguard (2022–present); client relationship representative, Vanguard (2019–2022)

**Joseph Gardner (1995)**

B.S. Accounting, Arizona State University (2019)

Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); tax associate, Price Kong CPAs & Consultants (2021); tax associate, Edwards, Largay, Mihaylo, and Co. (2020–2021); corporate tax intern, Rogers Corporation (2019); sales tax project team lead, DollarDays International (2019)

**Will Harold Garnaas (2000)**

B.S. Finance and Economics, Grand Canyon University (2022)

Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); associate banker, JPMorgan Chase (2021–2022); remote marketing representative, Sidecar LLC (2021); server, Flower Child (2019–2020); golf cart attendant, Tierra Oaks Country Club (2019)

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B.S. Finance, Boise State University (2016)

Financial planner, Vanguard (2019–present)

**Michael Gathers-LeMar (1996)**

B.B.A., Neumann University (2019)

Financial planner, Vanguard (2023–present); advisor support representative, Vanguard (2022–2023); relationship banker, JPMorgan Chase (2021–2022); associate banker, JPMorgan Chase (2019–2021)

**Elias Gazda (2000)**

B.A. Business administration, Franklin & Marshall College (2022)

Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); market analyst intern, JM Search (2021); head lifeguard, Framingham Country Club (2019–2020); swim coach/instructor, Framingham Country Club (2019–2020)

**Michael David Gee (1988)**

B.A. Business, Arizona State University (2016)

Financial planner, Vanguard (2021–present); sales consultant, Vanguard (2019–2021); investment professional, Vanguard (2019)

**Donald M. George Jr., CFP® (1977)**

B.A. Communications, Rider University (2001)

Financial planner, Vanguard (2022–present); vice president – relationship manager/portfolio management, Glenmede Trust (2019–2021)

**Hope C. Gerban, CFP® (1955)**

B.A. Organizational leadership, Eastern University (2005)

Financial planner, Vanguard (2019–present)

**Peter James Gerdt Jr. (1999)**

B.S. Finance, West Chester University (2021)

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Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); sourcing rotational/flex intern, Bristol-Meyer Squibb (2020–2021); management intern, Transition Patient Services, LLC (2019)

**Michael Giangiordano, CFP® (1991)**

B.S. Supply chain and information systems, The Pennsylvania State University (2014)  
Financial planner, Vanguard (2021–present); client consultant, Vanguard (2020–2021); retirement plan service representative, Vanguard (2019–2020)

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Financial planner, Vanguard (2019–present)

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B.Phil. Political science, The Pennsylvania State University (2004)  
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Financial planner, Vanguard (2021–present); head of client experience, Thread International (2021); wealth advisor, EisnerAmper Wealth Management (2019–2021)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2019–present)

**Anthony L. Giordano, CFP® (1969)**

B.S. Accounting, Bloomsburg University of Pennsylvania (1991)  
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B.S. Accounting, Dominican College (1993)  
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**Porfilia Gloria (1979)**

B.S. Finance, Arizona State University (2007)  
M.B.A., Grand Canyon University (2021)  
Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021)

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B.S. International relations, West Chester University (2017)  
Financial planner, Vanguard (2022–present); sales specialist, Vanguard (2021–2022); retirement plan specialist, Vanguard (2019–2021); retirement plan specialist, Randstad (2019)

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Manager, Vanguard (2019–present)

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B.S.B.A. Finance and Risk management and insurance, University of South Carolina (2018)  
Financial planner, Vanguard (2021–present); financial professional, Equitable Advisors (2019–2021)

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B.S. Business administration/Finance, University of South Carolina (1999)  
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**Alec Goldman (1999)**

B.S. Personal finance, University of Wisconsin–Madison (2021)  
Financial planner, Vanguard (2022–present); financial representative, Northwestern Mutual (2020); tennis starter, Elite Amenity (2019–2020); gym attendant, Elite Amenity (2019–2020); operations and accounting intern, Premier HealthCare (2019)

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B.S. Marketing, West Chester University (2013)  
Financial planner, Vanguard (2019–present)

**Daniel Gorman (1996)**

B.S. Business management, Florida Gulf Coast University (2019)  
Financial planner, Vanguard (2023–present); advisor support representative, Vanguard (2022–2023); portfolio implementation associate, Vanguard (2021–2022); retirement plan specialist, Vanguard (2019–2021); produce associate, Giant Food Stores (2019)

**Matthew Robert Goshey, CFP® (1986)**

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Financial planner, Vanguard (2020–present); change of ownership specialist, Vanguard (2019–2020)

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Financial planner, Vanguard (2019–present)

**Brooks Gould, CFP® (1994)**

B.S. Personal financial planning, Utah Valley University (2021)  
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); financial coach, Utah Valley University Money Management Resource Center (2020–2021); client relationship associate, my529 (2020); research analyst, Xactware (2019–2020)

**Eric Gould (1999)**

B.A. Financial planning, Arizona State University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); environment, social, and governance investment practicum, Arizona State University (2021–2022); servers' assistant, Four Peaks Brewing Company (2021–2022); wealth management intern, Arrowroot Family Office (2020); driver, DoorDash (2020)

**Craig Nelson Gower Jr., CFP® (1977)**

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B.A. African and African American studies, Lehman College (2020)  
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Financial planner, Vanguard (2022–present); client foundation financial advisor, UBS (2021); marketing intern, Cococozy (2020); sales specialist, Swarovski (2019)

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**Vincent Gregorovich (1969)**

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**Larry Brad Griffin (1961)**

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Manager, Vanguard (2021–present); financial advisor, AIG (2020–2021); director of wealth management, Happy State Bank (2019–2020)

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Financial planner, Vanguard (2021–present); specialist, Vanguard (2020–2021); sales agent, Assurance IQ, Inc. (2019–2020); announcer, Sinclair Broadcast Group (2019–2020); financial planner, Janney Montgomery Scott (2019); production assistant, Scranton Wilkes-Barre Yankees (2019)

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**Samantha Grissom, CFP® (1990)**

B.A. Economics, University of Notre Dame (2012)  
Financial planner, Vanguard (2019–present)

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B.A. Political science, Texas Tech University (2015)  
M.S. Personal financial planning, Texas Tech University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); intern, Financial Synergies Wealth Advisors (2022); mortgage loan originator, Quicken Loans (2021–2022); retirement consultant, GWFS Equities, Inc. (2021); licensed banker, JPMorgan Chase (2019–2020)

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B.S. Psychology, Arizona State University (2013)  
Financial planner, Vanguard (2022–present); advisor support representative, Vanguard (2021–2022); portfolio implementation associate, Vanguard (2019–2021); retirement plan specialist, Vanguard (2019)

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B.A. Political science, Dickinson College (2016)  
Financial planner, Vanguard (2021–present); client consultant, Vanguard (2020–2021); retirement specialist, Vanguard (2019–2020); investment professional, Vanguard (2019)

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B.S. Business administration, Alabama State University (1986)  
Financial planner, Vanguard (2020–present); communications administrator, Vanguard (2019–2020)

**Robert Timothy Gump, CFP® (1966)**

B.A. Journalism, Indiana University (1988)  
M.P.A. Public administration, University of Kansas (1990)  
Financial planner, Vanguard (2023–present); senior lead planner, Facet Wealth (2020–2023); financial advisor, Waddell & Reed (2019–2020)

**Avnish Gupta (1999)**

BCom, Finance, McGill University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); quick response force and infantry support, Singapore Armed Forces (2019)



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B.S. Business administration, Bucknell University (2004)  
Manager, Vanguard (2022–present); branch manager, TD Ameritrade (2019–2021)

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B.S. Finance, Villanova University (2010)  
Financial planner, Vanguard (2019–present)

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B.S.B.A. Entrepreneurship, Central Michigan University (2006)  
Financial planner, Vanguard (2022–present); registered representative, GoldBook Financial (2020–2022); soccer coach, Phoenix Rising Football Club Youth Soccer (2019–2021); senior associate, Emerson Equity (2020); private wealth advisor, e3 Wealth (2019–2020)  
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B.S. Biology, Yale University (1977)  
Financial planner, Vanguard (2019–present)

**Tyler Hakel (1997)**

B.S. Finance, The Pennsylvania State University (2019)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); financial service representative, Erie Federal Credit Union (2021–2022); teller, Erie Federal Credit Union (2021); teller, Northwest Bank (2020–2021); usher, Cinemark (2019–2020)

**Lauren Judith Hall, CFP® (1962)**

B.S. Marketing, University of Phoenix (2000)  
M.B.A., University of Phoenix (2003)  
Financial planner, Vanguard (2019–present)

**McKenzie Arrott Hall, CFP® (1999)**

B.S. Personal financial planning, Texas Tech University (2021)  
B.S. Agricultural and applied economics, Texas Tech University (2021)  
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); advice intern, Randstad (2020); client services representative, BentOak Capital (2019–2020); student assistant, Top Tier Catering (2019)

**Corrina Halter (1968)**

B.A. Political science, Washington State University (2002)  
E.M.S.L. Sustainability leadership, Arizona State University (2021)  
Financial planner, Vanguard (2021–present); financial advisor, Equitable Advisors, LLC (2019–2020); control manager, JPMorgan Chase (2019)

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B.S.B. Finance, University of Phoenix (2008)  
Manager, Vanguard (2019–present); supervisor, Vanguard (2019)

**Susan Halter (1961)**

B.S. Television production, Emerson College (1984)  
Financial planner, Vanguard (2021–present); owner, Connections Consulting (2020–2021); associate program director – executive education, Simmons University (2019–2020)

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B.S. Business administration, Goldey-Beacom College (1998)  
Financial planner, Vanguard (2019–present)

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B.S. Finance, The University of North Carolina at Wilmington (2016)  
Financial planner, Vanguard (2019–present)

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B.Sc. Chemistry, Kirori Mal College (1980)  
M.Sc. Chemistry, University of Delhi (1982)  
M.B.A. Marketing, University of the West of Scotland (2002)  
Financial planner, Vanguard (2022–present); registered representative, Equitable Advisors (2021–2022); supply chain manager, Sigma Corporation (2019–2022); master tax advisor, H&R Block (2019–2022); district leader, PFS Investments (2019–2021)

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B.A. Psychology, Temple University (1992)  
Financial planner, Vanguard (2019–present)

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B.S. Professional studies, Widener University (2012)  
M.S. Financial services, Saint Joseph’s University (2018)  
Financial planner, Vanguard (2019–present)

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B.B.A. Finance, The University of Toledo (1987)  
Financial planner, Vanguard (2022–present); advisor support representative, Vanguard (2021–2022); change-of-ownership specialist, Vanguard (2020–2021); client relationship associate, Vanguard (2019–2020); senior annuity specialist, MetLife (2019)

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B.S.B.A. Finance/Economics, Rockhurst University (1987)  
Financial planner, Vanguard (2019–present)

**Gregory Hansen (1975)**

B.S. Accountancy, Arizona State University (2003)  
M.B.A., The University of Texas at San Antonio (2015)  
Manager, Vanguard (2021–present); director of financial advice and solutions group, USAA (2019–2021)

**Rodger Hanson, CFP® (1965)**

B.B.A. Finance, University of Alaska Fairbanks (1997)  
Financial planner, Vanguard (2021–present); client consultant, Vanguard (2019–2021); customer service representative, Vanguard (2019)

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B.A. Political science, Rider University (2006)  
M.B.A. Finance, Villanova University (2012)  
Manager, Vanguard (2019–present); supervisor, Vanguard (2019)

**Brittney Harris, CFP® (1997)**

B.S. Financial planning, University of Delaware (2019)  
Financial planner, Vanguard (2020–present); financial advisor development program, Vanguard (2019–2020); student ambassador, University of Delaware (2019)

**Nicholas Taylor Harris (1993)**

B.S.B.A. Marketing, Appalachian State University (2015)  
Financial planner, Vanguard (2022–present); client representative, Vanguard (2021–2022); branch banker, Truist (2019–2021)

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B.B.A. Business administration, Queens University of Charlotte (2006)  
M.S. Accounting, Strayer University (2010)  
Manager, Vanguard (2019–present)

**Benjamin Harrison, CFP® (1994)**

B.A. Economics, University of Pittsburgh (2016)  
Financial planner, Vanguard (2019–present)

**Erin Kit Wei Harrison (1990)**

B.Bus.Com. Accounting, Finance and Macroeconomics, Monash University (2013)  
Financial planner, Vanguard (2022–present); Vanguard Return to Work intern, Randstad (2022); paraplanner, BS Financial Advisory (2019)

**Matthew Harter (1998)**

B.S. Finance, The Pennsylvania State University (2020)  
Financial planner, Vanguard (2023–present); financial advisor, Global Advisor Group (2020–2022); wealth management intern, Radnor Financial Advisors (2019)

**Paige Elizabeth Hartian (1997)**

B.A. Economics, Virginia Tech (2019)  
Manager, Vanguard (2023–present); supervisor, Vanguard (2021–2023); client representative associate, Vanguard (2019–2021); brokerage investment professional, Vanguard (2019); sales lead, Ann Inc. (2019)

**Stephanie J.F. Hartman, CFP® (1984)**

B.S. Business administration, Lindenwood University (2012)  
Financial planner, Vanguard (2021–present); client case representative, Vanguard (2019–2021); inheritance specialist, Vanguard (2019)

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A.A., Catawba Valley Community College (2011)  
B.S. Sports medicine, Appalachian State University (2014)  
Financial planner, Vanguard (2019–present)

**William John Harvey III, CFP® (1970)**

B.A. Communications, Elon University (1995)  
Manager, Vanguard (2019–present)

**Kevin Hatten (2000)**

B.S. Finance, The Pennsylvania State University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); intern, Siemens Healthineers (2021); server, Gigi's Southern Table (2020–2021); shopper, Instacart (2020–2021); server, The Deauville Inn (2019–2020)

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B.S. Business administration, East Carolina University (2015)  
Financial planner, Vanguard (2019–present)

**Hilary Hayes (1971)**

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Financial planner, Vanguard (2022–present); Vanguard Return to Work intern, Randstad (2022); financial consultant, self-employed (2019–2022); Co-Owner/Managing Partner, Highland Markets, LLC (2019–2022); board member, Friends of Butterfield Library (2019)  
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Financial planner, Vanguard (2023–present); Vanguard Return to Work intern, Randstad (2022); high net worth senior financial advisor, Personal Capital (2019–2020)

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Financial planner, Vanguard (2019–present); relationship consultant, Vanguard (2019)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2019–present)

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B.S. Biblical studies, Cairn University (2017)  
M.B.A., Cairn University (2017)  
Financial planner, Vanguard (2020–present); client consultant, Vanguard (2019–2020); client service specialist, Vanguard (2019); brokerage investment professional, Vanguard (2019)

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B.S. Business administration, Grand Canyon University (2018)  
Financial planner, Vanguard (2022–present); advisor support representative, Vanguard (2020–2022); retirement plan specialist, Vanguard (2019–2020)

**Quantrel Wes Hedrick, CFP® (1990)**

B.A. English literature, Howard University (2015)  
Financial planner, Vanguard (2023–present); financial planning manager, Westwood Holdings Group (2022–2023); private wealth advisor, Westwood Holdings Group (2020–2022); financial planning and analysis specialist, Westwood Holdings Group (2020–2022); financial planner, RGT Wealth Advisors (2019–2020)

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B.A. Business administration, Western State Colorado University (2016)

B.A. Economics, Western State Colorado University (2016)  
Financial planner, Vanguard (2019–present); operations service administrator, Vanguard (2019); investment professional, Vanguard (2019)

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B.S. Economics, Northern Illinois University (1988)  
B.S. Information technology, Western Governors University (2012)  
Financial planner, Vanguard (2019–present)

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B.S. Personal financial planning, Utah Valley University (2021)  
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); volunteer financial coach, Utah Valley University Money Management Resource Center (2020–2021); client services manager, Net Worth Advisory Group (2019–2021); consumer loan officer, America First Federal Credit Union (2019)

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B.A. Political science, East Carolina University (2014)  
Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021); client relationship administrator, Vanguard (2019)

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B.A. Philosophy, The University of Scranton (2006)  
Financial planner, Vanguard (2019–present)

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B.S. Marketing, Clemson University (2012)  
M.B.A., East Carolina University (2016)  
Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2020–present); relationship manager, Vanguard (2019–2020)

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B.S. Finance, Arizona State University (2007)  
Financial planner, Vanguard (2019–present)

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B.S. Financial management, Clemson University (2016)  
Financial planner, Vanguard (2019–present)

**Alex Hilbert (1986)**

B.A. Bible, Bob Jones University (2009)  
Financial planner, Vanguard (2022–present); account manager, JNR Networks LLC (2021–2022); owner, Hilbert Financial Group LLC (2019–2021)

**Daniel Hilby, CFP® (1986)**

B.A. Accounting and finance, Augustana College (2009)  
Financial planner, Vanguard (2019–present)

**Matthew Paul Hildebrand (1975)**

B.B.A. Marketing, Temple University (1998)  
Manager, Vanguard (2019–present); sales coach and strategist, Vanguard (2019)

**Christopher Reed Hill, CFP® (1992)**

B.S. Personal financial planning, Utah Valley University (2017)  
Financial planner, Vanguard (2020–present); client consultant, Vanguard (2019–2020); client service specialist, Vanguard (2019)

**Thomas Hill, CFP® (1988)**

B.S. Economics, East Carolina University (2011)  
Financial planner, Vanguard (2019–present)

**Brian K. Hilliard, CFP® (1970)**

B.S.B.A. Accounting and Finance, Drexel University (1993)  
Financial planner, Vanguard (2020–present); relationship executive, Vanguard (2019–2020)

**Claire Hillis, CFP® (1997)**

B.A. Finance, Michigan State University (2019)  
Financial planner, Vanguard (2020–present); financial advisor development program, Vanguard (2019–2020)

**Michael Ross Hillyer, CFP® (1975)**

B.S. Finance, The Pennsylvania State University (1997)  
M.B.A., The Pennsylvania State University (2008)  
Manager, Vanguard (2019–present)

**Daniel Curtis Hinson, CFP® (1992)**

B.S. Economics, Florida Southern College (2013)  
Financial planner, Vanguard (2019–present)

**Rue Hite (1980)**

B.A. Media arts, University of South Carolina (2004)  
Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021); quality assurance administrator, Vanguard (2019)

**Natalie Rossi (1994)**

B.B.A. Finance and Entrepreneurship and innovation, Gonzaga University (2017)  
Manager, Vanguard (2021–present); supervisor, Vanguard (2020–2021); support lead, Vanguard (2019–2020)

**Charles Hoffecker, CFP® (1985)**

B.B.A. International business, University of North Florida (2009)  
M.B.A. Business management, University of North Florida (2011)  
M.B.A. International business, Universidad Rey Juan Carlos (2011)  
Financial planner, Vanguard (2021–present); financial advisor, Merrill Lynch (2019–2021)

**Drew Isaac Hoffman (2000)**

B.S. Sport industry, The Ohio State University (2022)  
B.S. Consumer and financial family services, The Ohio State University (2022)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); financial planning assistant, Ameriprise Financial (2021–2022); fan experience and marketing intern, The Ohio State University Department of Athletics (2020–2022) assistant, Deluxe Packaging Inc. (2020–2021); summer intern, JEVS Human Services (2020); camp counselor, JCC Camps at Medford (2019)

**Jonathan E. Hohn, CFP® (1973)**

B.B.A., University of Michigan (1998)  
M.B.A., Wayne State University (2005)  
Financial planner, Vanguard (2019–present)

**Sarah Beth Holahan (1977)**

B.S. Psychology and Criminal justice, DeSales University (2005)  
M.B.A. Management, DeSales University (2011)  
Financial planner, Vanguard (2022–present); premier banker, Wells Fargo (2019–2022); personal banker, Wells Fargo (2019)

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B.A. Business administration, Queens University (1982)  
Financial planner, Vanguard (2019–present)

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B.S. Marketing, Northern Arizona University (2006)  
M.B.A., University of Phoenix (2010)  
Financial planner, Vanguard (2019–present)

**Andrew Hornung (1997)**

B.A. Accounting and Financial planning, University of Jamestown (2021)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); financial representative, Northwestern Mutual (2021–2022); supply chain intern, Collins Aerospace (2019–2020)

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Manager, Vanguard (2020–present); financial planner, Vanguard (2019–2020)

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B.S.B.A. Accounting, West Virginia University (2013)  
Financial planner, Vanguard (2021–present); accountant, Vanguard (2019–2021); auditor, Vanguard (2019)

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B.S. Economics, University of Dhaka (2002)  
Financial planner, Vanguard (2021–present); financial advisor, Morgan Stanley (2019–2021)

**Gregory L. Houpp, CFP® (1973)**

B.S. Accounting, University of Delaware (1995)  
Financial planner, Vanguard (2019–present)

**Kelly Michelle Howe, CFP® (1998)**

B.S. Financial planning, University of Georgia (2020)  
B.S. Psychology, University of Georgia (2020)  
M.S. Behavioral financial planning, University of Georgia (2021)  
Financial planner, Vanguard (2022–present); social media manager, Chief Financial Mom (2021–2022); financial advisor development program, Vanguard (2021–2022); secret shopper, Market Force Information (2019–2022); clicklist associate, The Kroger Company (2020); discovering money solutions coach – Project Fostering Relationships and Economic Enrichment, University of Georgia (2019–2020); university housing desk assistant, University of Georgia (2019)

**Javonte Hubbard (1996)**

B.S. Management and business economics, University of California, Merced (2018)  
Financial planner, Vanguard (2022–present); retirement specialist, Vanguard (2019–2022); account executive, Yelp (2019)

**Bradley Huff, CFP® (1968)**

B.B.A. Marketing, Midwestern State University (1992)  
Financial planner, Vanguard (2023–present); financial advisor, Wells Fargo Advisors (2019–2023); financial advisor, Merrill Lynch (2019)

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B.A. Communication, Temple University (1988)  
Financial planner, Vanguard (2019–present)

**Alexander Hunt, CFP® (1993)**

B.S. Business administration, Saint Joseph's University (2015)  
Financial planner, Vanguard (2020–present); client service specialist, Vanguard (2019–2020)

**Andrew Ryan Hutchinson (1999)**

B.S.B.A. Business economics, The University of Arizona (2021)  
Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); sales assistant intern, Heffernan Insurance Brokers (2020); business development intern, Bfac.com (2019)

**Jacob Lawrence Hybert (2000)**

B.S. Finance, Arizona State University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); cashier and cook, FatBurger (2021); sales associate, Dollar General (2020)

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B.A. Humanities and History, University of San Diego (2001)  
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Financial planner, Vanguard (2019–present)



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Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); advice intern, Randstad (2021); senior community assistant, American Campus Communities – Raiders Pass (2019–2021); peer counselor, Texas Tech University – Red to Black Peer Financial Coaching (2019–2021)

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B.B.A. Finance, Grand Valley State University (2011)

Financial planner, Vanguard (2022–present); private client advisor/vice president–investments, JPMorgan Chase (2019–2022)

**Kraig A. Jackson (1986)**

B.B.A. Trust and wealth management, Campbell University (2011)

M.B.A., Webster University (2012)

M.I.M.F.A., Creighton University (2021)

Financial planner, Vanguard (2021–present); investment advisor, PNC Investments, LLC (2019–2021)

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B.A. African American studies, Harvard University (1976)

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Financial planner, Vanguard (2019–present); senior financial advisor, Capital One (2019)

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B.S. Political science, The University of Arizona (2013)

Financial planner, Vanguard (2022–present); client representative, Vanguard (2020–2022); financial advisor, Merrill Lynch (2019–2020); senior sales manager, Yelp, Inc. (2019)

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B.S. Electronic media, Kutztown University of Pennsylvania (2010)

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Financial planner, Vanguard (2023–present); retirement plan advisor, Empower Retirement/Great-West Financial (2021–2022); participant services team leader, Infosys BPM (2020–2021); participant services team leader, Vanguard (2019–2020); learning support specialist, Vanguard (2019)

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B.S. Business administration, Bowling Green State University (2008)

Financial planner, Vanguard (2019–present)

**Stephen Jesse, CFP® (1996)**

B.S. Business economics, The State University of New York at Oneonta (2020)

Financial planner, Vanguard (2022–present); sales consultant, Vanguard (2021–2022); financial advisor, Cetera Investment Services LLC (2020–2021); financial services intern, Foresters Financial (2019); financial services associate, CAP COM Federal Credit Union (2019)

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B.S. Finance, Bentley University (2022)

Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); operations associate, Staples (2019–2022); cashier, Stop & Shop (2020)

**Veronica Joe (1976)**

B.S.B.A. Finance, The University of North Carolina at Charlotte (2011)

M.B.A., Winthrop University (2014)

Financial planner, Vanguard (2022–present); Vanguard Return to Work intern, Randstad (2022)

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B.S. Business management, Northern Arizona University (2017)

Financial planner, Vanguard (2020–present); client consultant, Vanguard (2019–2020); investment professional, Vanguard (2019)

**Alan Edward Johnson, CFP® (1965)**

B.S. Economics and Finance, Central Michigan University (1987)

Financial planner, Vanguard (2021–present); senior portfolio manager, Dividend Assets Capital (2019–2021)

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B.S. Public relations, Illinois State University (2005)

Manager, Vanguard (2022–present); supervisor, Vanguard (2019–2022); financial planner, Vanguard (2019)

**Daniel Johnson, CFP® (1982)**

B.A. Biblical studies, Bethel University (2005)

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Financial planner, Vanguard (2019–present)

**Kurt Johnson, CFP® (1992)**

B.A. Finance, Muhlenberg College (2015)

Financial planner, Vanguard (2019–present)

**Thomas Richard Johnson, CFP® (1979)**

B.S. Communication, The University of Arizona (2002)

Manager, Vanguard (2019–present)

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B.B.A. Finance, Temple University (2018)

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**Hunter T. Jones (1995)**

B.S. Sport management, North Carolina State University (2017)  
Financial planner, Vanguard (2021–present); financial advisor,  
Edward Jones (2019–2021); outreach specialist, Atrium Health  
(2019)

**Mark Edward Jones, CFP® (1968)**

B.S. Military history, United States Military Academy (1991)  
Financial planner, Vanguard (2019–present); homemaker,  
personal residence (2019)

**Perry Thomas Jones II (1985)**

University of Phoenix (2013–2014, non-degree)  
Financial planner, Vanguard (2021–present); financial  
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**Christopher James Jorgensen, CFP® (1972)**

B.S. Hotel and restaurant management, Northern Arizona  
University (1994)  
Manager, Vanguard (2022–present); financial planner,  
Vanguard (2020–2022); retirement income specialist, USAA  
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Financial planner, Vanguard (2019–present)

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M.S. Financial services, Saint Joseph's University (2007)  
M.B.A. Accounting, Saint Joseph's University (2007)  
Financial planner, Vanguard (2019–present)

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B.S. Business administration, Millersville University (2013)  
Financial planner, Vanguard (2019–present)

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B.A. Geography, Humboldt State University (1983)  
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Financial planner, Vanguard (2021–present); financial advisor,  
Interactive Wealth Advisors (2019–2021)

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Financial planner, Vanguard (2022–present); high net worth  
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professional, Equitable Advisors (2019–2021); bag boy, Tucson  
Country Club (2019); data analyst, CCS Information Systems  
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Financial planner, Vanguard (2020–present); portfolio  
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Financial planner, Vanguard (2022–present); senior fixed  
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Financial planner, Vanguard (2021–present); onboarding NIGO  
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Financial planner, Vanguard (2019–present); wealth manager,  
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Financial planner, Vanguard (2020–present); senior business  
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Financial planner, Vanguard (2021–present); Vanguard Return to Work intern, Randstad (2021); independent contractor, self-employed (2019)

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Manager, Vanguard (2019–present)

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Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); administrative assistant, Distinctive Rental Properties (2021–2022); Vanguard remote contractor, Randstad (2021); administrative assistant, Distinctive Rental Properties (2020–2021); division of summer session student ambassador, Purdue University (2019–2020)

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Financial planner, Vanguard (2019–present)

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B.S. Urban engineering and economy, Kyiv National University of Construction and Architecture (1998)  
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Financial planner, Vanguard (2023–present); Vanguard return to work intern, Randstad (2023); volunteer, 1K Project for Ukraine (2022); landlord, self (2019–2022); owner, Ukraine Organics, LLC (2019); owner, Saprotek, LLC (2019); owner, Volynsaprofos, LLC (2019)  
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Financial planner, Vanguard (2023–present); Vanguard return-to-work intern, Randstad (2023); board member, The Rancho Sante Fe Foundation (2021–2023); parent association president and board member, The Bishop's School (2019)

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Financial planner, Vanguard (2020–present); centralized wealth management advisor, TIAA (2019–2020)

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Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); business finance intern, Dow (2021); office manager, J&S Landscaping (2020)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2021–present); Vice President/Investment Advisor, PNC Wealth Management (2019–2021)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2022–present); relationship representative specialist, Vanguard (2019–2022); assigned representative, Vanguard (2019)

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Financial planner, Vanguard (2021–present); financial advisor, M&T Securities/LPL Financial (2020–2021); financial advisor, PFG/Vicus Capital (2019–2020)

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B.S. Real estate, The Pennsylvania State University (2004)  
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Manager, Vanguard (2019–present)

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Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); pet sitter, self-employed (2019–2021); teaching assistant, Texas Tech University (2020–2021); bank teller, First Capital Bank of Texas (2019–2020); manager, Choc'late Mousse Pie Bar (2019)

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Financial planner, Vanguard (2024–present); wealth management associate, Vanguard (2022–2024); advisor support representative, Vanguard (2021–2022); portfolio implementation associate, Vanguard (2020–2021); executive and retirement services specialist, Vanguard (2019)

**Christopher L. Madeira, CFP® (1987)**

B.S. Finance, University of Pittsburgh (2010)  
Financial planner, Vanguard (2019–present)  
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**Juan C. Magana, CFP® (1985)**

B.S. Finance and Economics, West Chester University (2012)  
Financial planner, Vanguard (2020–present); financial consultant, Fidelity (2019–2020); financial planner, Vanguard (2019)

**Zachary Maheu (1999)**

B.S. Business, The Ohio State University (2021)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); server, Red Robin (2021); driver, DoorDash (2021); delivery driver, Dominos (2020); student chef, Ohio State Catering (2019–2020); quality intern, Edgewell Personal Care (2019); seasonal employee, Dover Pools (2019)

**Kyle Paul Mahle, CFP® (1988)**

B.B.A. Trust and wealth management, Campbell University (2011)  
M.B.A., Campbell University (2011)  
Financial planner, Vanguard (2021–present); lead planner, Facet Wealth (2020–2021); financial planning strategist, BB&T (2019–2020); financial planning analyst, BB&T (2019)

**Vincent Maimone, CFP® (1987)**

B.B.A. Finance, Temple University (2009)  
Financial planner, Vanguard (2019–present)

**Michael Mallette (1993)**

B.S.B.A. Finance and banking, Appalachian State University (2017)  
B.S.B.A. Management, Appalachian State University (2017)  
Financial planner, Vanguard (2021–present); client consultant, Vanguard (2019–2021); client experience specialist, Vanguard (2019); investment professional, Vanguard (2019)

**Thomas Maltese, CFP® (1981)**

B.S.B.A. Information management and analysis, Supply chain management, Shippensburg University of Pennsylvania (2003)  
Financial planner, Vanguard (2019–present)

**Robert Matthew Malzberg (1999)**

B.S. Finance, University of Delaware (2021)  
Financial planner, Vanguard (2022–present); financial advisor development program analyst, Bank of America Merrill Lynch (2021–2022); financial advisor summer analyst, Bank of America Merrill Lynch (2020); premium sales and services intern, New York Yankees (2019); bookkeeper, Kings Super Markets (2019)

**Eric Mancuso, CFP® (1984)**

B.S. Marketing, The Pennsylvania State University (2006)  
M.B.A. Finance, Marywood University (2014)  
Financial planner, Vanguard (2022–present); client care representative, Vanguard (2021–2022); portfolio implementation associate, Vanguard (2019–2021); brokerage investment professional, Vanguard (2019)

**Felix Stephen Mandato Jr., CFP® (1981)**

B.S. Pharmaceutical marketing, Saint Joseph's University (2003)  
Financial planner, Vanguard (2019–present)

**Lee T. Mann, CFP® (1989)**

B.S. Business administration, North Carolina State University (2011)  
M.P.A., North Carolina State University (2013)  
Financial planner, Vanguard (2019–present)

**George T. Mantzoros III, CFP® (1983)**

B.A. History, The Pennsylvania State University (2007)  
Financial planner, Vanguard (2019–present)

**Chelsea Mapes, CFP® (1987)**

B.S. Interdisciplinary studies, The University of Texas at El Paso (2010)  
M.B.A. Finance, The University of Texas at El Paso (2017)  
Financial planner, Vanguard (2021–present); client consultant, Vanguard (2019–2021); client service specialist, Vanguard (2019)

**Joseph Marcelli, CFP® (1987)**

B.S. Finance, University of Delaware (2009)  
Financial planner, Vanguard (2022–present); relationship and portfolio manager, Glenmede Trust Company (2019–2021)

**Alexander W. March, CFP® (1984)**

B.S. Finance, West Chester University of Pennsylvania (2007)  
Financial planner, Vanguard (2019–present)



**Mindi Marisa, CFP® (1979)**

B.S. Mathematics, The Pennsylvania State University (2001)

M.B.A. Finance, New York University (2007)

Principal, Vanguard (2024–present);

Department head, Vanguard (2019–2024); manager, Vanguard (2019)

**Justin Clay Marshall, CFP® (1990)**

B.S.B.A. Finance, University of South Carolina (2013)

B.S.B.A. Accounting, University of South Carolina (2013)

Financial planner, Vanguard (2019–present)

**Caleb Martin, CFP® (1980)**

B.B.A. Financial Services and planning, Baylor University (2002)

Financial planner, Vanguard (2021–present); investment services manager, GuideStone Financial Resources (2019–2021)

**Catherine McClaine Martin, CFP® (1995)**

B.B.A. Marketing, University of North Georgia (2017)

Financial planner, Vanguard (2021–present); financial advisor, Edward Jones (2019–2021)

**Gary Martin, CFP® (1985)**

B.S. Finance, West Chester University of Pennsylvania (2009)

Financial planner, Vanguard (2019–present)

**Stephen R. Martin, CFP® (1983)**

B.S.B.A. Finance, Appalachian State University (2005)

Financial planner, Vanguard (2019–present)

**William Martin, CFP® (1994)**

B.S. Mathematics, Southwestern Oklahoma State University (2019)

Financial planner, Vanguard (2022–present); workplace planning consultant, Fidelity Investments (2021–2022); private banker, JPMorgan Chase (2021); financial advisor, Equitable Advisors (2019–2021)

**Ahmed Antonio Martinez (1975)**

B.A. Communications in mass media, Pace University (1997)

Financial planner, Vanguard (2019–present)

**Judith A. Martinez, CFP® (1965)**

B.S. Finance, University of Pennsylvania (1987)

M.B.A., Villanova University (1997)

Financial planner, Vanguard (2019–present)

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**Xavier Martinez (1992)**

B.S. Sports management, East Stroudsburg University (2014)

Manager, Vanguard (2023–present); financial planner, Vanguard (2021–2023); client service representative, Vanguard (2019–2021); participant services representative, Vanguard (2019)

**Morgan Marvelli, CFP® (1984)**

B.A. Finance, The University of North Carolina at Charlotte (2007)

M.B.A. Finance, College of Charleston (2011)

Financial planner, Vanguard (2019–present)

**Anastasia Alicia Massiah, CFP® (1981)**

B.S. Business information technology, Virginia Tech (2003)

Financial planner, Vanguard (2019–present)

**Ryan Stephan Mastilak, CFP® (1994)**

B.S. Finance, Robert Morris University (2016)

Financial planner, Vanguard (2020–present); client experience specialist, Vanguard (2019–2020)

**Matt Saji Mathew, CFP® (1961)**

B.A. Economics, University of Kerala, India (1982)

M.A. Economics, University of Kerala, India (1985)

M.B.A., University of Dallas (2005)

Financial planner, Vanguard (2022–present); vice president–financial consultant, Fidelity Investments (2019–2021); financial consultant, Fidelity Investments (2019)

**Joseph Michael Matranga, CFP® (1989)**

B.S. Business management, The Pennsylvania State University (2011)

Financial planner, Vanguard (2019–present)

**Marlene Taylor Matula, CFP® (1995)**

B.A. International issues, Juniata College (2017)

M.B.A., West Chester University (2022)

Manager, Vanguard (2023–present); supervisor, Vanguard (2020–2023); financial planner, Vanguard (2019–2020); investment professional, Vanguard (2019)

**Rebecca Mautz, CFP® (1996)**

B.S. Financial planning, William Paterson University (2018)

Manager, Vanguard (2022–present); financial planner, Vanguard (2019–2022); financial advisor development program, Vanguard (2019)

**Nicholas Max, CFP® (1966)**

B.A. Economics, Illinois State University (1989)

M.B.A., Northern Illinois University (2006)

Financial planner, Vanguard (2022–present); financial planner, Empower (2019–2022); private client advisor, Charles Schwab (2019)

**John Maybury, CFP® (1982)**

B.S.B.A. Finance, Waynesburg University (2004)

Financial planner, Vanguard (2019–present)

**John Mazzei, CFP® (1992)**

B.B.A. Business administration, The University of New Mexico (2015)

Financial planner, Vanguard (2022–present); vice president, financial consultant, Charles Schwab (2020–2022); financial consultant, Fidelity Investments (2019–2020)

**Douglas McAllister, CFP® (1977)**

B.S. Psychology, Saint Joseph's University (1999)

M.B.A., Saint Joseph's University (2006)

Financial planner, Vanguard (2019–present)

**Jessica M. McBride, CFP® (1979)**

B.S. Business administration, Ramapo College (2001)  
M.B.A., University of Phoenix (2006)  
Financial planner, Vanguard (2019–present)  
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**Nelia M. McBride (1970)**

B.A. Economics, Rutgers University (1994)  
Financial planner, Vanguard (2021–present); Vanguard Return to Work intern, Randstad (2021)

**William J. McBride, CFP® (1963)**

B.S. Finance, Northeastern University (1987)  
M.B.A. Finance, The Pennsylvania State University (1992)  
Financial planner, Vanguard (2021–present); senior investment advisor, PNC Wealth Management (2019–2020)

**Casey Jean McCallister (1999)**

B.S. Finance, Lehigh University (2021)  
Financial planner, Vanguard (2022–present); advisor support representative, Vanguard (2021–2022); customer sales associate, The Preppy Palm (2019–2020)

**Kelly James McCarrel (1980)**

B.S. Hotel restaurant management, Northern Arizona University (2002)  
Manager, Vanguard (2019–present)

**Athena J. McCarthy, CFP® (1985)**

B.S.B.A. Finance and Marketing, University of Pittsburgh (2007)  
M.B.A. General management, Drexel University (2019)  
Manager, Vanguard (2019–present); business project manager, Vanguard (2019)

**Ryan McCarty, CFP® (1991)**

A.S., McHenry County College (2011)  
B.S. Finance, Illinois State University (2013)  
Financial planner, Vanguard (2019–present)

**Keegan McCarville (1998)**

A.A. General studies and Arts, South Mountain Community College (2018)  
B.S. Management, Northeastern University (2021)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); portfolio manager, Stearns Bank N.A. (2022); player, Milwaukee Brewers Baseball Club (2019–2021); cashier, Superpumper (2020)

**Heather McClain, CFP® (1971)**

B.A. Liberal studies, University of Hawaii (1993)  
M.B.A. Global management, University of Phoenix Online (2002)  
Financial planner, Vanguard (2019–present)

**Edward O. McConnell, CFP® (1972)**

B.A. Industrial relations, The University of North Carolina at Chapel Hill (1994)  
Financial planner, Vanguard (2019–present)

**John McConnell, CFP® (1976)**

B.A. Interdisciplinary studies, Belmont Abbey College (2022)  
Financial planner, Vanguard (2022–present); founder, McConnell Financial (2020–2022); director of advisor development, Quantum (2019–2020)

**Errol Timothy McCoy, CFP® (1969)**

B.S. Accounting and finance, Ball State University (1993)  
Financial planner, Vanguard (2019–present)

**Claire E. McCusker, CFP® (1963)**

B.A. English, Regis College (1985)  
M.A. English, Georgetown University (1988)  
J.D. Georgetown University Law Center (1994)  
Principal, Vanguard (2019–present)

**John Roman McCutchen (1986)**

B.A. Psychology, West Chester University (2012)  
Financial planner, Vanguard (2019–present)

**Robert McDevitt, CFP® (1958)**

B.B.A., Temple University (1980)  
M.B.A. Finance, Drexel University (1986)  
Financial planner, Vanguard (2019–present)

**James McDonald (1997)**

B.S. Corporate finance, Bloomsburg University (2019)  
Financial planner, Vanguard (2023–present); portfolio implementation associate, Vanguard (2021–2023); personal relationship banker, Truist Bank (2020–2021); client supervisor, Wayne Moving and Storage (2019–2020)

**Caleigh Elizabeth McDonough (2000)**

B.S. Finance, Virginia Tech (2022)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); financial planning scribe, CrossPoint Wealth Partners (2021–2022); contract driver, GrubHub (2021–2022); contract driver, Door Dash (2021–2022); capital markets intern, Freddie Mac (2021); single-family intern, Freddie Mac (2020–2021); waitress, Macado's (2019); financial planning assistant, Voya Financial (2019); referee, United States Soccer Federation (2019)

**Kyle P. McEvoy, CFP® (1984)**

B.A. Music industry, The State University of New York at Oneonta (2006)  
Financial planner, Vanguard (2019–present)

**Sean Francis McGlinchey, CFP® (1986)**

B.S., Rutgers University (2008)  
M.B.A., Villanova University (2016)  
Financial planner, Vanguard (2019–present)

**Jacqueline Powell McGrath (1983)**

B.S. Finance, The Pennsylvania State University (2005)  
Manager, Vanguard (2021–present); fixed income trader, Vanguard (2019–2021)

**Connor McGuire, CFP® (1997)**

B.S. Business management, West Chester University (2019)  
B.S. Marketing, West Chester University (2019)  
Financial planner, Vanguard (2021–present); client case representative, Vanguard (2020–2021); change of ownership specialist, Vanguard (2020); client relationship associate, Vanguard (2019–2020)

**James Patrick McGuire, CFP® (1970)**

B.A. Economics, University of South Carolina (1994)  
Financial planner, Vanguard (2019–present)

**Thomas McKinney (1968)**

B.A. Audio engineering, California State University, Dominguez Hills (1991)  
Financial planner, Vanguard (2021–present); financial advisor, Prudential Advisors (2021); financial consultant, TIAA (2019–2020)

**Craig McLane, CFP® (1981)**

B.A. Religious studies, Santa Clara University (2003)  
Financial planner, Vanguard (2019–present)

**Madeline McLinden, CFP® (1995)**

B.S. Finance, University of Delaware (2018)  
B.S. Financial planning, University of Delaware (2018)  
Financial planner, Vanguard (2019–present); financial advisor development program, Vanguard (2019)

**Tyler McMahan, CFP® (1997)**

B.B.A. Finance and Financial Planning, Temple University (2019)  
Financial planner, Vanguard (2020–present); financial advisor development program, Vanguard (2019–2020); president and director of communication, Temple University Financial Planning Association (2019)

**Tracy Lynn McMacken, CFP® (1977)**

B.A. Communication, Arizona State University (2015)  
B.A. Sociology, Arizona State University (2015)  
Financial planner, Vanguard (2022–present); advisor support representative, Vanguard (2021–2022); portfolio implementation associate, Vanguard (2019–2021); operations specialist, Vanguard (2019)

**Michael C. McManus, CFP® (1960)**

B.S. Finance, Saint John's University (1982)  
M.S. Finance, Baruch College (2000)  
Financial planner, Vanguard (2021–present); portfolio manager, Rockland Trust Company (2019–2021)

**Madison McNamara (2000)**

B.S. Financial planning and wealth management, University of Delaware (2021)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); summer intern, Maillie LLP (2021); micro intern, Creative Financial Group (2021); purchasing department intern, Universal Machine Company (2019–2020)

**Christopher McNulty, CFP® (1995)**

B.S. Accounting, Saint Joseph's University (2017)  
Financial planner, Vanguard (2020–present); client consultant, Vanguard (2019–2020); investment professional, Vanguard (2019)

**Laurie Beth Meade, CFP® (1974)**

B.A. Philosophy, University of South Carolina (2000)  
Financial planner, Vanguard (2019–present); retirement specialist, Vanguard (2019)

**Tarjani Mehta, CFP® (1999)**

B.B.A. Financial planning, Temple University (2021)  
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); program organizational and outreach intern, Time Out (2020); finance assistant intern, Edelman Wealth Management Group, Inc. (2020); sales associate, Forever 21 (2019–2020); crew member, Chipotle (2019)

**Timothy Jon Melanson Jr., CFP® (1990)**

B.S. Finance, real estate, and law, California State Polytechnic University, Pomona (2014)  
Financial planner, Vanguard (2021–present); client representative, Vanguard (2020–2021); retirement specialist, Vanguard (2019–2020)

**Alan Menase, CFP® (1981)**

B.A. Psychology, University of Delaware (2003)  
Financial planner, Vanguard (2022–present); financial advisor, Mallard Financial Partners (2019–2022)

**Michael Joseph Meneghetti (1999)**

Houston Community College (Fall 2016, Spring 2017, Summer 2019, and Summer 2020, non-degree)  
B.S. Agricultural economics, Texas A&M University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); student assistant, Texas A&M University-College Station (2022)

**Filippo Menegon (1999)**

B.S. Business studies, Stockton University (2021)  
Financial planner, Vanguard (2023–present); client relationship associate, Vanguard (2022–2023); financial analyst, Bally's Corporation (2021–2022)  
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**Douglas R. Mento (1975)**

B.S. Civil engineering, Lehigh University (1997)  
M.B.A., Saint Joseph's University (2011)  
Principal, Vanguard (2019–present)

**Nicholas Mercer, CFP® (1979)**

B.A. History, University of Florida (2001)  
M.S. Financial management, University of Maryland Global Campus (2012)  
Financial planner, Vanguard (2022–present); financial planner, Suncoast Credit Union (2022); driver helper, UPS (2022); financial planner, Fisher Investments (2021–2022); financial planner, USAA (2019–2021)

**Douglas T. Merrigan, CFP® (1975)**

B.A. Political science, The State University of New York at Potsdam (1998)  
Financial planner, Vanguard (2019–present)

**Brian G. Metzger, CFP® (1966)**

B.S. Accounting, Juniata College (1989)  
Financial planner, Vanguard (2019–present)



**Robert Mexcur, CFP® (1990)**

B.S. Investment finance, University of South Carolina (2013)  
Financial planner, Vanguard (2020–present); investment  
associate, Vanguard (2019–2020)

**Christopher Meyer, CFP® (1970)**

B.B.A Marketing and Management, University of Wisconsin–  
Madison (1992)

M.B.A, University of Saint Thomas – Minnesota (2007)  
Financial planner, Vanguard (2021–present); vice president  
– wealth management, U.S. Bank (2019–2021)

**Jason Miehle, CFP® (1986)**

B.S. Financial management, Clemson University (2008)  
Manager, Vanguard (2019–present)

**Adam Robert Mielke, CFP® (1998)**

B.S. Personal finance, University of Wisconsin-Madison (2020)  
Financial planner, Vanguard (2022–present); financial advisor  
development program, Vanguard (2021–2022); delivery driver,  
DoorDash (2020); financial representative intern, Northwestern  
Mutual (2019–2020); owner, AB Window Washing (2019)

**Calvin Montgomery Mihal (1999)**

B.B.A. Finance, University of Kentucky (2022)  
Financial planner, Vanguard (2023–present); advance to  
financial planning associate, Vanguard (2022–2023);  
community assistant/leasing agent, The Wyatt Apartments  
(2019–2022); finance and accounting summer intern, Winston  
Products, LLC (2021); leasing agent, The Hub on Campus  
Lexington (2019)

**Mike Mikulich, CFP® (1982)**

B.A. Communication studies, Arizona State University (2006)  
Financial planner, Vanguard (2019–present)

**Aviva Miller, CFP® (1976)**

B.A. Economics and Accounting, University of Ben Gurion (2001)  
Financial planner, Vanguard (2019–present); Vanguard Return  
to Work intern, Randstad (2019)

**Christopher Dale Miller, CFP® (1992)**

A.A. General studies, Kellogg Community College (2014)  
B.B.A. Finance, Southern Adventist University (2017)  
Financial planner, Vanguard (2021–present); change of  
ownership specialist, Vanguard (2020–2021); brokerage  
investment professional, Vanguard (2019–2020); director of  
development, Wisconsin Academy (2019)

**Kevin E. Miller, CFP® (1978)**

B.S. Economics, The Pennsylvania State University (2002)  
M.B.A., The Pennsylvania State University (2012)  
Financial planner, Vanguard (2019–present)

**Robin Miller, CFP® (1981)**

B.A. Economics, Colorado State University (2005)  
Financial planner, Vanguard (2022–present); financial education  
specialist, MBO Partners (2021–2022); financial planner, Robin  
Miller Financial, LLC (2020–2021); financial planner and client  
relationship manager, Jeff Huff & Associates (2019–2021);  
investment services relationship manager, Westgate Capital  
Consultants (2019)

**Ryan Miller, CFP® (1979)**

B.S. Finance and Management, University of South  
Carolina (2002)  
Financial planner, Vanguard (2019–present)

**Janar Milligan (1999)**

B.S. Financial planning, University of Illinois Urbana-  
Champaign (2022)  
Financial planner, Vanguard (2023–present); financial advisor  
development program, Vanguard (2022–2023); delivery driver,  
GrubHub (2020–2022); caller, University of Illinois (2019–  
2022); sales associate, DTLR (2019–2020); dining hall  
cashier, University of Illinois (2019)

**Khalif Mink (1994)**

Community College of Philadelphia (2021–2022, non-degree)  
Financial planner, Vanguard (2022–present); private client  
banker, JPMorgan Securities LLC (2021–2022); relationship  
banker, JPMorgan Chase (2020–2021); enumerator, U.S.  
Census Bureau (2020); associate banker, JPMorgan Chase  
(2019–2020); sales representative, State Farm (2019); branch  
sales representative, Police and Fire Federal Credit Union  
(2019)

**Alberto Miranda, CFP® (1994)**

B.A. Economics, The University of Texas at Austin (2016)  
Financial planner, Vanguard (2021–present); financial solutions  
consultant, PNC Bank (2020–2021); personal banker, Wells  
Fargo (2019–2020); relationship banker, JPMorgan Chase  
(2019)

**Justin Alvarado Miramontes, CFP® (1999)**

A.A., New Mexico Junior College (2018)  
A.S., New Mexico Junior College (2018)  
B.S. Personal financial planning, Texas Tech University (2021)  
Financial planner, Vanguard (2022–present); financial advisor  
development program, Vanguard (2021–2022); leasing agent,  
The Grove Lubbock Apartments (2020–2021); meat deli clerk,  
Albertsons (2019–2020)

**Christopher Andrew Mitchell, CFP® (1980)**

B.S. Finance, Fairfield University (2002)  
Financial planner, Vanguard (2019–present)

**Jeremy Mitchell, CFP® (1977)**

B.A. Economics, The University of New Mexico (2004)  
Financial planner, Vanguard (2021–present); financial  
consultant, BBVA (2019–2020); wealth management advisor,  
TIAA (2019)

**Chadi Mneiny, CFP® (1982)**

M.S. Telecommunication engineering, Telecom SudParis,  
France (2006)  
M.B.A. Strategy and Finance, New York University (2015)  
Manager, Vanguard (2019–present)

**Melisa Mondino, CFP® (1970)**

B.A. Biology, Ottawa University (2011)  
B.A. Health Care Management, Ottawa University (2011)  
M.B.A., Grand Canyon University (2018)  
Manager, Vanguard (2019–present)



**Adam Montgomery, CFP® (1981)**

B.S. Finance, The University of North Carolina at Charlotte (2004)

Financial planner, Vanguard (2019–present)

**Darrell Montgomery (1977)**

B.S. Business management, Western Colorado University (2003)

Manager, Vanguard (2022–present); sales consultant, Vanguard (2020–2022); sales associate, Vanguard (2019–2020); client service specialist, Vanguard (2019)

**Alexis Montoya (1999)**

B.S. Economics, University of Illinois Urbana-Champaign (2021)

Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); intern, Valeo Financial Advisors (2021); sales associate, Calvin Klein (2019–2021); sales associate, Converse (2019)

**Spencer Moody (1966)**

B.A. International relations, Brigham Young University (1992)

M.B.A. International business, Thunderbird School of Global Management (1994)

Financial planner, Vanguard (2021–present); financial representative, Northwestern Mutual (2020–2021); field representative, Quintero & Partners (2019–2020); field representative, Bankers Life (2019); consultant/account lead, MediaCom Latin America (2019)

**Derek Moon, CFP® (1976)**

B.A. Business administration, Goshen College (1998)

Financial planner, Vanguard (2019–present)

**Brett Oliver Moore (2000)**

B.A. Economics and Hispanic and Latin American languages, literatures, and linguistics, University of Florida (2022)

Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); retail lending product management intern, PNC Financial Services Group (2021); workshop manufacturer, Caldwell's Windowware (2021)

**Nelson Ernest Moore, CFP® (1993)**

A.A. Communication studies, College of the Canyons (2014)

B.A. Communication studies, California State University, Long Beach (2016)

Financial planner, Vanguard (2020–present); investment consultant, Vanguard (2019–2020); assigned representative, Vanguard (2019)

**George Morakis, CFP® (1964)**

B.S. Electrical engineering, NYU Polytechnic School of Engineering (1987)

J.D. Law, New York Law School (1991)

M.B.A. Finance, New York University (2001)

Financial planner, Vanguard (2021–present); investment counselor, Fisher Investments (2020–2021); financial consultant, JP Morgan Chase (2020); private client advisor, JPMorgan Chase (2019–2020)

**James Moran, CFP® (1982)**

B.S. Communications, Arizona State University (2018)

Financial planner, Vanguard (2019–present); wealth manager, USAA (2019)

**Ryan Moran, CFP® (1997)**

B.B.A. Finance and Financial planning, Temple University (2018)

Financial planner, Vanguard (2020–present); financial advisor development program, Vanguard (2019–2020)

**Shari Morelli (1968)**

B.A. English, The State University of New York at Albany (1990)

M.Ed. Elementary education, New York University (1998)  
Financial planner, Vanguard (2022–present); Vanguard Return to Work intern, Randstad (2022); owner and founder, Mainline Tutoring Collaborative (2020–2021); interim director, Main Line Reform Temple Early Childhood Education (2019–2020); owner and founder, Backtalk Designs (2019)

**William T. (Tom) Moren, CFP® (1960)**

B.S. Accounting, Arizona State University (1992)

M.S. Financial planning, College for Financial Planning (2005)

Financial planner, Vanguard (2019–present)

**John Carey Morency (1996)**

B.S. Business administration, University of New Hampshire (2019)

Financial planner, Vanguard (2022–present); financial planner, MML Investor Services (2019–2022); financial services professional, MassMutual Life Insurance Company (2019–2022); financial services professional, Mutual of Omaha Insurance Company (2019); inside sales representative, Harbour Capital Corporation (2019)

**William Kerry Morgan, CFP® (1994)**

B.A. Language and International trade, Clemson University (2017)

Financial planner, Vanguard (2021–present); financial advisor, Resolute Capital LLC (2020–2021); financial advisor, Edward Jones (2019–2020)

**Carl Moritz, CFP® (1970)**

B.S. Hospitality management, Northern Arizona University (1994)

M.B.A., Arizona State University (2005)

Financial planner, Vanguard (2021–present); advisor support representative, Vanguard (2020–2021); financial planner, Vanguard (2019–2020)

**Jina Leonardi Muir (1968)**

B.A. Psychology, Temple University (1991)

M.S. Psychology, The University of Baltimore (1995)

Financial planner, Vanguard (2022–present); Vanguard Return to Work intern, Randstad (2022); executive assistant, Taurus Investment Group, LLC (2022); executive assistant, The Philadelphia International Opera (2022)

**Danny Geoffrey Murego (1997)**

B.S.B.A. Finance and Management information systems, The University of Arizona (2020)

Financial planner, Vanguard (2022–present); client case representative, Vanguard (2021–2022); client representative, Vanguard (2021); student fundraiser, Ruffalo Noel Levitz (2020); investment analyst intern, MRA Associates (2019); Take Charge Cats ambassador, Take Charge America Institution (2019–2020)

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**Holly Murphy (1974)**

B.S. Finance and International business, The Pennsylvania State University (1996)

Financial planner, Vanguard (2022–present); Vanguard Return to Work intern, Randstad (2022); agent, Keller Williams Real Estate (2019–2022); owner, Neptune Plumbing & Heating, LLC (2019)

**Ryan C. Murray, CFP® (1988)**

B.A. Business and Economics, Ursinus College (2010)  
B.A. Media and communications, Ursinus College (2010)  
Financial planner, Vanguard (2019–present)

**Ashman Ram Murti, CFP® (1989)**

B.S. Business management, California State University, Sacramento (2012)  
M.B.A., Saint Mary's College of California (2016)  
Financial planner, Vanguard (2022–present); vice president, financial consultant, Charles Schwab (2019–2020)

**John Musewicz, CFP® (1977)**

B.A. Psychology, University of Notre Dame (1999)  
M.B.A., Widener University (2008)  
Psy.D., Widener University (2008)  
Manager, Vanguard (2019–present); principal, Vanguard (2019)

**Michael R. Musial, CFP® (1981)**

B.A. Communications, The Pennsylvania State University (2003)  
M.B.A. Management, La Salle University (2010)  
Manager, Vanguard (2019–present); supervisor, Vanguard (2019)

**Peter Daniel Mytych, CFP® (1989)**

B.S.B.A. Marketing, University of Pittsburgh (2012)  
Manager, Vanguard (2020–present); supervisor, Vanguard (2019–2020)

**Rachel Nabers (2000)**

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Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); intern, FMP Wealth Advisors (2021)

**Neha Nagpal (1988)**

BSc. Physics, Chemistry and Mathematics, D.A.V Post Graduate College Dehradun (2008)  
M.B.A. Logistics and supply chain management, University of Petroleum and Energy Studies (2010)  
Ph.D. Supply chain management, University of Petroleum and Energy Studies (2013)  
Financial planner, Vanguard (2023–present); asset transfer specialist, Vanguard (2021–2023); account maintenance specialist, Randstad (2020–2021); senior enrollment analyst, Cognizant (2020)

**Brian Nash, CFP® (1997)**

B.S. Finance and Business information systems, University of Pittsburgh (2019)  
Financial planner, Vanguard (2023–present); advisor support representative, Vanguard (2021–2023); brokerage investment professional, Vanguard (2020–2021); client relationship associate, Vanguard (2019–2020)

**John Neal, CFP® (1984)**

B.S. Finance, Saint Joseph's University (2006)  
Financial planner, Vanguard (2019–present)

**Joseph David Neal (1985)**

B.S. Education, University of Kansas (2010)  
M.Ed. Education, Wichita State University (2016)  
Financial planner, Vanguard (2020–present); financial advisor, Wells Fargo Advisors (2019–2020)

**Michael Leonard Needles (1999)**

B.S. Finance, The Pennsylvania State University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); acquisitions intern, City Line Capital (2021); clerk, Fred's Liquor (2020); sailing instructor, Yacht Club of Stone Harbor (2019); chef, Yacht Club of Stone Harbor (2019)

**Luke Neely, CFP® (1983)**

B.S. Pre-law legal studies, University of Central Florida (2005)  
Financial planner, Vanguard (2019–present)

**Brendan Neibergall (1983)**

University of Illinois (2001–2004, non-degree)  
Manager, Vanguard (2022); affluent leader vice president, Wells Fargo (2019–2021); affluent segment leader vice president, Wells Fargo (2019)

**Ben A. Neill, CFP® (1979)**

B.S.B.A. Business administration, Northern Arizona University (2001)  
M.B.A., Arizona State University (2008)  
Financial planner, Vanguard (2019–present)

**Loren Neumeister, CFP® (1994)**

B.S. Business management, University of Colorado Colorado Springs (2016)  
M.B.A., Grand Canyon University (2019)  
Financial planner, Vanguard (2021–present); sales specialist, Vanguard (2020–2021); client solutions consultant, Vanguard (2019–2020); brokerage investment professional, Vanguard (2019)

**Emma Rae Nichols, CFP® (1996)**

B.S.F.C.S. Financial planning, University of Georgia (2019)  
M.S. Financial Planning, University of Georgia (2019)  
Financial planner, Vanguard (2020–present); financial advisor development program, Vanguard (2019–2020); intern, Cannon Financial Strategists, Inc. (2019); tutor, University of Georgia Athletic Association (2019)

**Ryan M. Nielsen, CFP® (1986)**

B.S. Finance and economics, Grand Canyon University (2015)  
Financial planner, Vanguard (2022–present); relationship manager, Vanguard (2019–2022)

**Jakob Joseph Nines (1989)**

B.A. Film and media arts, Temple University (2012)  
Financial planner, Vanguard (2021–present); trading and operations, Lincoln Financial Advisors (2019–2021)

**Albert M. Nisanov, CFP® (1971)**

B.S. Finance, Arizona State University (2003)  
Financial planner, Vanguard (2022–present); fixed income specialist, Vanguard (2019–2022)

**Justin Nnabuife, CFP® (1991)**

B.S. Agricultural economics, Texas A&M University (2018)  
Financial planner, Vanguard (2021–present); financial advisor, Ameriprise Financial (2019–2021)

**Bryan Edward Nolan, CFP® (1988)**

B.F.A. Film studies, University of Colorado Boulder (2014)  
M.B.A. Finance, Thomas Jefferson University (2016)  
Financial planner, Vanguard (2021–present); communication administrator, Vanguard (2020–2021); retirement plan service representative, Vanguard (2019–2020)

**Timothy James Nolt, CFP® (1986)**

B.P.S. Culinary arts management, The Culinary Institute of America (2010)  
Financial planner, Vanguard (2020–present); client representative, Vanguard (2019–2020); client service specialist, Vanguard (2019)

**Kirk William Norley, CFP® (1969)**

B.A. Political science, University of California, Berkeley (1992)  
J.D., University of California, Los Angeles (1995)  
Financial planner, Vanguard (2021–present); tax resolution specialist, Vanguard (2019–2021)

**Jeffrey Dylan North (1992)**

B.A. Economics, Washington and Jefferson College (2014)  
Financial planner, Vanguard (2021–present); executive correspondent, Vanguard (2019–2021); asset transfer specialist, Vanguard (2019)

**Greg Novick, CFP® (1994)**

B.S. Family business entrepreneurship and Food marketing, Saint Joseph's University (2017)  
Financial planner, Vanguard (2021–present); portfolio implementation associate, Vanguard (2019–2021); retirement plan associate, Vanguard (2019)

**Samantha Novotny (1987)**

B.S.B.A. Finance, Kutztown University (2009)  
M.L.D. Leadership development, The Pennsylvania State University (2016)  
Manager, Vanguard (2019–present)

**Nicholas James Nowakowski, CFP® (1986)**

B.S. Economics, The Pennsylvania State University (2009)  
Financial planner, Vanguard (2019–present)

**Dayton Patrick Nussle (1996)**

B.S. Finance, Arizona State University (2020)  
Financial planner, Vanguard (2022–present); client representative, Vanguard (2021–2022); server, Marriott (2019)

**Charlie Antone O'Brien (1994)**

B.S. Nonprofit leadership and management, Arizona State University (2021)  
Financial planner, Vanguard (2022–present); financial advisor, Equitable Advisors, LLC (2021–2022); technology support, Microsoft (2019–2020); bay host, Top Golf (2019–2020)

**Jeffrey O'Brien, CFP® (1993)**

B.A. Finance, The University of Iowa (2016)  
Financial planner, Vanguard (2020–present); relationship banker, JPMorgan Chase (2019–2020)

**John O'Connor, CFP® (1977)**

B.S. Business administration, Nebraska Wesleyan University (2000)  
Financial planner, Vanguard (2019–present)

**Christopher D. Oden, CFP® (1984)**

B.S. Civil engineering, North Carolina State University (2008)  
Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2019–present)  
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B.S. Business, Covenant University, Nigeria (2008)  
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Manager, Vanguard (2019–present)

**Elise Oligmueller, CFP® (1989)**

B.A. Communications, The University of Arizona (2012)  
Financial planner, Vanguard (2019–present)

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B.S. Business management, Western Governors University (2015)  
Financial planner, Vanguard (2019–present)

**Nancy Alejandra Oliver (1981)**

B.S. Marketing, Universidad Catolica de Honduras (2003)  
M.B.A., Universidad Catolica de Honduras (2007)  
Financial planner, Vanguard (2022–present); Vanguard Return to Work Intern, Randstad (2022)

**Edmund Oliveros, CFP® (1968)**

B.S. Health education, Minnesota State University Moorhead (1992)  
M.B.A., Webster University (2016)  
Financial planner, Vanguard (2019–present)  
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**Alaira Olmos (2000)**

B.B.A. Finance, University of North Florida (2022)  
B.B.A. Financial planning, University of North Florida (2022)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); administrative assistant, Equitable Advisors (2021–2022); financial representative intern, Northwestern Mutual (2021); photographer's assistant, Clix Portrait Studios (2020–2021)

**Christopher Ryan O'Neill, CFP® (1987)**

B.S.B.A. Finance, Northern Arizona University (2010)  
Financial planner, Vanguard (2019–present)

**Hayden Alexander Ong (1995)**

B.S. Computer science, Arizona State University (2018)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); senior software engineer, General Dynamics Mission Systems (2020–2022); software engineer, General Dynamics Mission Systems (2019–2020); software engineering intern, General Dynamics Mission Systems (2019)

**Kevin Opdyke, CFP® (1990)**

B.S. Finance, The Pennsylvania State University (2012)  
Financial planner, Vanguard (2021–present); change of ownership services representative, Vanguard (2019–2021); operations specialist, Vanguard (2019)

**Tina Marie Ornelas, CFP® (1989)**

B.B.A. Marketing and management, The University of Texas at El Paso (2012)  
Financial planner, Vanguard (2019–present)

**Bryan Michael Orris, CFP® (1967)**

B.S. Liberal studies, West Chester University (1991)  
Financial planner, Vanguard (2019–present)

**Yajaira Ortiz-Wilson (1973)**

B.A. Political science, West Chester University (1996)  
J.D., Temple University (1999)  
Financial planner, Vanguard (2023–present); Vanguard Return to Work intern, Randstad (2022); director of Program for Academic and Leadership Skills, Youth Leadership Foundation (2019–2020)

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B.S. Accounting, Northern Arizona University (2007)  
Financial planner, Vanguard (2019–present)

**Carl P. Ozeck, CFP® (1989)**

B.S. Liberal studies, Cairn University (2011)  
Financial planner, Vanguard (2019–present)

**Christopher Pace, CFP® (1989)**

B.S. Business administration, Bryant University (2011)  
Financial planner, Vanguard (2019–present)

**James Benjamin Palmer, CFP® (1989)**

A.S. General studies, South Plains College (2015)  
B.S. Personal financial planning, Texas Tech University (2018)  
Financial planner, Vanguard (2022–present); wealth advisor, TMD Wealth Management LLC (2021–2022); associate financial advisor, Runey and Associates Wealth Management (2019–2021)

**Joseph S. Papandrea, CFP® (1967)**

B.S. Agricultural economics, University of Maryland College Park (1990)  
Financial planner, Vanguard (2019–present)

**Katherine (Kate) Park, CFP® (1984)**

B.A. Psychology, Loyola Marymount University (2006)  
M.C., Arizona State University (2009)  
Financial planner, Vanguard (2019–present)

**Lony Floyd Parker, CFP® (1982)**

B.S. Economics and business, Arizona State University (2005)  
Financial planner, Vanguard (2022–present); investment consultant, Fisher Investments (2021–2022); vice president – financial consultant, Charles Schwab (2019–2021)

**Joseph Foster Parsons, CFP® (1992)**

B.B.A. Financial planning, Liberty University (2015)  
Financial planner, Vanguard (2019–present)

**Brian Jacob Partridge, CFP® (1991)**

B.S. Personal financial planning, Utah Valley University (2018)  
M.B.A., Queens University of Charlotte (2022)  
Financial planner, Vanguard (2019–present); financial advisor development program, Vanguard (2019)

**George F. A. Pastino, CFP® (1977)**

B.A. Finance, Shippensburg University of Pennsylvania (2001)  
Financial planner, Vanguard (2019–present)

**Devesh Patel (1984)**

B.S. Finance, Arizona State University (2010)  
Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021)

**Tiana Patillo, CFP® (1987)**

B.A. Political science, Bloomsburg University of Pennsylvania (2009)  
M.B.A. Management, Eastern University (2014)  
Manager, Vanguard (2019–present)

**Jackson Pauley, CFP® (1993)**

B.S. Finance, The University of Arizona (2015)  
Financial planner, Vanguard (2019–present)

**Kelsey Pauley, CFP® (1993)**

B.S. Business administration, University of Missouri (2015)  
Financial planner, Vanguard (2019–present)

**Cameron Dickinson Payne, CFP® (1989)**

B.S. Business management, West Virginia University (2010)  
Financial planner, Vanguard (2020–present); sales manager, Dixon Hughes Goodman LLP (2019–2020)

**Jason Payne, CFP® (1995)**

B.S. Finance, Winston-Salem State University (2018)  
Financial planner, Vanguard (2021–present); financial advisor, Morgan Stanley (2019–2021)



**Joshua David Pearson (1992)**

B.S. Marketing and Finance, Bloomsburg University (2015)  
Financial planner, Vanguard (2022–present); sales  
associate, J.Crew (2022); senior registered client service  
associate, WSFS Wealth Investments (2019–2021);  
registered client associate, Merrill Lynch (2019)

**Mark A. Pearson, CFP® (1959)**

B.S. Finance, Western International University (2003)  
Financial planner, Vanguard (2019–present)

**Michael L. Perhne, CFP® (1964)**

B.S. Finance, Ferris State University (1989)  
Financial planner, Vanguard (2021–present); retirement income  
specialist, self-employed (2020–2021); wealth advisor, Alphastar  
Capital Management (2019–2020)

**Samuel Pemberton, CFP® (1986)**

B.S. Economics, Wake Forest University (2008)  
M.B.A., Villanova University (2021)  
Financial planner, Vanguard (2019–present)

**Bryan T. Pentz, CFP® (1976)**

B.S. Business administration/Finance, Grove City College (1998)  
Financial planner, Vanguard (2019–present)

**Zachary Pepper (1999)**

B.S. Finance, The Pennsylvania State University (2022)  
Financial planner, Vanguard (2023–present); advance to  
financial planning associate, Vanguard (2022–2023); finance  
intern, Reckitt (2021); financial accountant intern, CARE  
Property Services (2019–2021); census enumerator, United  
States Department of Commerce (2020); soccer referee,  
Pennsylvania Interscholastic Athletic Association (2019–  
2020); crew member, Penn State Berkey Creamery (2019)

**Zachary John Perret, CFP® (1979)**

B.A. English language and literature, University of Maryland  
(2009)  
M.B.A. Marketing, University of Saint Thomas – Houston  
(2017)  
Financial planner, Vanguard (2023–present); vice president –  
financial consultant, Charles Schwab (2022–2023); financial  
planner, Mercer Global Advisors (2021); financial consultant,  
E\*TRADE (2019–2021); private client banker, JPMorgan  
Chase (2019); financial advisor, Edward Jones (2019)

**Jennifer Elizabeth Perry, CFP® (1981)**

B.A. Economics and business administration, Ursinus  
College (2006)  
Financial planner, Vanguard (2021–present); financial  
advisor, Wells Fargo Advisors (2019–2020); senior client  
associate, Wells Fargo Advisors (2019–2020)

**Lance Perry (1987)**

B.S. Business administration, Daemen College (2010)  
Manager, Vanguard (2023–present); financial planner,  
Vanguard (2022–2023); sales support specialist, First  
Command Financial Services, Inc. (2019–2022)

**Vernell Peter-Koyi, CFP® (1966)**

B.S.B.A. Accounting, Shippensburg University (1988)  
M.B.A., West Chester University (1998)  
Financial planner, Vanguard (2019–present)

**Matthew Robert Peters, CFP® (1985)**

B.S. Finance and Banking, Appalachian State University (2008)  
Financial planner, Vanguard (2019–present)

**Christopher Peterson, CFP® (1978)**

B.S. Criminal justice, Northern Arizona University (2000)  
M.B.A., Colorado State University (2017)  
Financial planner, Vanguard (2019–present)

**Kevin E. Peterson, CFP® (1973)**

B.A. Communication studies, Virginia Tech (1995)  
Masters in Communication and information studies, Rutgers  
University (2003)  
Financial planner, Vanguard (2019–present)

**Jack P. Pierce, CFP® (1958)**

B.S. Finance, Arizona State University (1979)  
M.P.S. Political science, Auburn University (1993)  
Financial planner, Vanguard (2019–present)

**Charles Gilbert Piland Jr., CFP® (1971)**

B.A. Government and international studies, University of South  
Carolina (1993)  
M.S. Personal financial planning, Texas Tech University (2018)  
Financial planner, Vanguard (2019–present); financial advisor  
development program, Vanguard (2019)

**Chad Pinney (2000)**

B.S. Finance, Oregon State University (2022)  
Financial planner, Vanguard (2022–present); substitute teacher,  
Salem Keizer School District (2021–2022); direct support  
professional, Kids Individual Development Service (2021–2022);  
financial representative, Northwestern Mutual (2021); direct  
support professional, Rize Service, Inc. (2021); service  
manager, Chipotle (2019–2020)

**Brad Jeffery Playford, CFP® (1980)**

B.S. Finance and economics, Grand Canyon University  
(2017)  
Financial planner, Vanguard (2020–present); relationship  
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**William Henry Pluchel III, CFP® (1977)**

B.A. English, Arizona State University (2002)  
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Financial planner, Vanguard (2019–present)

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A.B.A. Business, Scottsdale Community College (2008)  
B.B.A. Accounting, University of the Southwest (2010)  
Financial planner, Vanguard (2021–present); retirement  
income specialist, USAA (2020–2021); wealth advisor, USAA  
(2019–2020)

**Nicolae Ciprian Porancea, CFP® (1976)**

A.A.S. Computer programming, Catawba Valley Community  
College (2005)  
B.S.B.A. Finance, The University of North Carolina at  
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Financial planner, Vanguard (2022–present); relationship  
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**Ryan Porter, CFP® (1994)**

B.B.A. Business administration and Finance, Gordon College (2017)

Financial planner, Vanguard (2019–present); operations service administrator, Vanguard (2019); investment professional, Vanguard (2019)

**James R. Poteet, CFP® (1966)**

B.S. Accounting, Oakland University (1991)  
M.B.A., Lake Superior State University (1996)  
Financial planner, Vanguard (2019–present)

**William Travis Powell, CFP® (1982)**

B.S. Management, Arizona State University (2004)  
M.B.A., Arizona State University (2008)  
Financial planner, Vanguard (2019–present)

**Courtney Jerome Powers (1979)**

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M.B.A., University of Phoenix (2015)  
Manager, Vanguard (2019–present)

**Jesse S. Powers, CFP® (1982)**

B.S. Business administration and Economics, Pfeiffer University (2005)  
Financial planner, Vanguard (2019–present)

**Sophoan Prak, CFP® (1981)**

B.S. Finance, Philadelphia University (2004)  
Financial planner, Vanguard (2019–present)

**Michael F. Presser Jr., CFP® (1986)**

B.A. Business administration, Finance and marketing, Albright College (2008)  
Financial planner, Vanguard (2019–present)

**Anthony Price Jr. (1983)**

B.S. Finance, John Carroll University (2006)  
Financial planner, Vanguard (2022–present); client consultant, Vanguard (2021–2022); participant services associate, Charles Schwab (2019–2021); senior internal auditor, PNC (2019)

**Justin Proudfoot (1991)**

B.S. Finance, Arizona State University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); portfolio analyst, Capstone Financial (2021–2022); owner and operator, New Leaf Trade (2019–2022); senior client specialist, Education at Work (2020–2021)

**John Dominic Pulcinella, CFP® (1992)**

B.S. Business, The Pennsylvania State University (2014)  
Financial planner, Vanguard (2020–present); portfolio implementation associate, Vanguard (2019–2020); retail client operations associate, Vanguard (2019)

**Brian Qualey, CFP® (1998)**

B.S. Financial planning, University of Georgia (2021)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); waiter, Modena Ristorante Vinoteca (2021); financial service provider, University of Georgia ASPIRE Clinic (2021); VITA tax preparer, Georgia United Credit Union (2021)

**Raymond C. Querey, CFP® (1969)**

B.A. History, Villanova University (1991)  
Financial planner, Vanguard (2019–present)

**Melissa Lynn Quillan, CFP® (1990)**

B.S. Marketing, Clemson University (2013)  
Financial planner, Vanguard (2019–present)

**Daniel P. Quinn, CFP® (1982)**

B.A. Management, Philadelphia University (2004)  
M.B.A., Philadelphia University (2005)  
Financial planner, Vanguard (2019–present)

**Jensen Coe Quinn (1998)**

B.S. Finance, University of Alabama (2021)  
M.S. Finance, Vanderbilt University (2022)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); investment analyst intern, Winterpast Capital Partners (2021); special project intern, Proffitt & Goodson Inc. (2021); intern, The Community Foundation of West Chester/liberty (2021); recruiter, Phi Kappa Psi Fraternity (2019)

**Phillip Daniel Quinn, CFP® (1995)**

B.A. Management and society, The University of North Carolina at Chapel Hill (2017)  
Financial planner, Vanguard (2021–present); associate financial advisor, Wells Fargo Advisors (2019–2021); portfolio analyst, Pacific Western Bank (2019)

**Lauren C Radvansky CFP® (1986)**

B.A. Architecture, The Pennsylvania State University (2009)  
Financial planner, Vanguard (2022–present); owner, Equine by Lauren Radvansky (2019–2022); décor customer associate, Terrain (2020–2021); retirement education specialist, Vanguard (2019–2022); financial planner, Vanguard (2019)  
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**Matthew B. Radvansky, CFP® (1973)**

B.A. History, University of Illinois at Urbana–Champaign (1995)  
Financial planner, Vanguard (2019–present)

**William Archibald Rainwater, CFP® (1991)**

B.S. Sport and entertainment management, University of South Carolina (2013)  
Financial planner, Vanguard (2019–present)

**Stephen Rattigan (1976)**

B.S. Economics, The Pennsylvania State University (2003)  
Financial planner, Vanguard (2022–present); client case representative, Vanguard (2022); executive and retirement services plan specialist, Vanguard (2021–2022); specialized retirement services representative, Vanguard (2020–2021); retirement plan specialist, Vanguard (2019–2020); institutional retirement specialist, Randstad (2019)

**Nathaniel A. Ratliff, CFP® (1978)**

B.S. University studies, Middle Tennessee State University (2004)  
M.B.A. Finance, East Carolina University (2013)  
Financial planner, Vanguard (2019–present)

**Kirk Reagan (1973)**

B.S. Astronautical engineering, United States Air Force Academy (1996)  
M.A.E. Aeronautical engineering, Auburn University (2001)  
M.S. Logistics, United States Air Force Institute of Technology (2009)  
Financial planner, Vanguard (2024–present); financial advisor development program, Vanguard (2023–2024); director of safety, United States Air Force (2020–2021); vice wing commander 412th test, United States Air Force (2019–2020)  
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**Mark E. Reali, CFP® (1961)**

B.S. Education, West Chester University of Pennsylvania (1983)  
Financial planner, Vanguard (2019–present)

**Bradley Charles Reber, CFP® (1984)**

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); private wealth management intern, The Mather Group (2020); junior analyst intern, Pranaventures (2019); administrative service assistant, Crane Agency (2019–2021); food service manager, Old Warson Country Club (2019)

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Financial planner, Vanguard (2021–present); advisory consultant, Delaware Funds by Macquarie (2019–2020)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2022–present); retirement planner, Fidelity Investments (2021–2022); financial advisor, Comerica Securities (2019–2020)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2022–present); change of ownership support lead, Vanguard (2022); client representative, Vanguard (2021–2022); coach, Soccer Shots RDU (2019); personal office assistant, Mary L. Cardello CPA, CFP (2019); market partner, Monat Global (2019–2021)

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Manager, Vanguard (2019–present)

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Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); server, Lost Way Brewery (2021); Vanguard remote contractor, Randstad (2021); peer financial counselor, Powercat Financial (2019–2022); student worker, Kansas State University Cashier's Office (2019–2020); student employee, Derby Dining Center (2019)

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Financial planner, Vanguard (2019–present)

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B.S. Meteorology, Millersville University (1988)  
M.Ed. Mathematics education, Rutgers University (1999)  
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Financial planner, Vanguard (2020–present); retirement specialist, Vanguard (2019–2020)

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B.A. Philosophy, Arizona State University (2015)  
B.S. Psychology, Arizona State University (2015)  
Financial planner, Vanguard (2022–present); crew member, Chipotle (2022); client services representative, Vanguard (2021–2022); client representative, Vanguard (2020–2021); retirement plan service representative, Vanguard (2019–2020)

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Financial planner, Vanguard (2019–present)

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Manager, Vanguard (2019–present)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2022–present); relationship manager, Vanguard (2021–2022); client consultant, Vanguard (2019–2021); assigned representative, Vanguard (2019)

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Manager, Vanguard (2023–present); financial planner, Vanguard (2019–2023)

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Manager, Vanguard (2019–present)

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Manager, Vanguard (2019–present)

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Financial planner, Vanguard (2024–present); financial advisor development program, Vanguard (2023–2024); intern, HFS Wealth Management (2022); dasher, DoorDash (2020–2022); baker, The Cheesecake Factory (2021); student ambassador, Texas Tech University (2019–2020); employee, Main Street Sno-Balls (2019)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); tax preparer, United Way of Erie County (2021–2022); groundskeeper, Lakeside Golf Course (2021); cashier, Rizer Fireworks (2019–2021)

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B.S. Business administration, Kutztown University of Pennsylvania (2006)  
Financial planner, Vanguard (2021–present); relationship manager, Vanguard (2019–2021)



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B.S. Finance, Virginia Tech (2021)  
B.S. Accounting, Virginia Tech (2021)  
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); intern, Carroll Financial (2020); intern, Atlas Financial (2019)

**Andres Silva (1996)**

B.S. Management and Business economics, University of California, Merced (2018)  
Financial planner, Vanguard (2022–present); advanced onboarding client case associate, Vanguard (2021–2022); onboarding specialist, Vanguard (2020–2021); client relationship associate, Vanguard (2019–2020); sales representative, Southern Glazer's Wine and Spirits (2019)

**Jimmy J. Silvano, CFP® (1967)**

B.S. Business management, Temple University (1990)  
Financial planner, Vanguard (2019–present)

**Michael J. Simek, CFP® (1971)**

B.A. Religious studies, Oral Roberts University (1993)  
M.Ed., Oral Roberts University (1997)  
Financial planner, Vanguard (2019–present)

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B.A. Spanish, The University of North Carolina at Chapel Hill (1998)  
Financial planner, Vanguard (2019–present)

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A.S. Education, Phoenix College (2007)  
B.S. Communication, Arizona State University (2009)  
Manager, Vanguard (2019–present)

**Sergei Skiba, CFP® (1974)**

B.S. Biology, Coastal Carolina University (1997)  
Financial planner, Vanguard (2019–present)

**Jeffrey Skousen, CFP® (1978)**

B.S. Psychology, Brigham Young University (2004)  
M.S. Personal financial planning, College for Financial Planning (2020)  
Financial planner, Vanguard (2022–present); financial planner, Charles Schwab (2019–2022)

**Alex Russell Small, CFP® (1991)**

B.A. English, The University of Arizona (2014)  
M.B.A., Western Governors University (2015)  
Financial planner, Vanguard (2020–present); portfolio implementation associate, Vanguard (2019–2020); specialized services representative, Vanguard (2019)

**Brian Smith, CFP® (1967)**

B.S. Engineering science and mechanics, The Pennsylvania State University (1989)  
Financial planner, Vanguard (2022–present); teacher, Wythe County Public Schools (2020–2022); financial advisor, Ameriprise Financial (2019–2020)  
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**Davon Smith (2000)**

B.S. Financial planning, Virginia Tech (2018)  
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); advice intern, Wealthspire Advisors (2021); seasonal associate, CVS (2020–2021); externship, TD Ameritrade (2020)

**Jordan Matthew Smith, CFP® (1990)**

B.S.B.A. Marketing, University of Nebraska (2013)  
Financial planner, Vanguard (2019–present)

**Mackenzie Smith, CFP® (1994)**

B.B.A. Finance, The University of Iowa (2016)  
Financial planner, Vanguard (2020–present); client consultant, Vanguard (2019–2020); assigned representative, Vanguard (2019); investment consultant, Vanguard (2019)

**Matthew J. Smith, CFP® (1989)**

B.S. Business management, Grove City College (2011)  
Financial planner, Vanguard (2019–present)

**Rick Smith (1959)**

B.S. Finance, California State University, Chico (1982)  
Financial planner, Vanguard (2021–present); financial advisor, Prudential Financial (2019–2021); financial services professional, Farmers Financial Solutions (2019)

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B.S. Political science, Northern Illinois University (2012)  
Financial planner, Vanguard (2020–present); financial advisor, Econ Wealth Management (2020); director of financial planning, Northwestern Mutual (2019–2020)

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B.S. Business administration, York College of Pennsylvania (2010)  
Financial planner, Vanguard (2020–present); investment administrator, Vanguard (2019–2020)

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Financial planner, Vanguard (2019–present)  
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**Andrew Soltes, CFP® (1980)**

B.S. Finance, Michigan State University (2002)  
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Manager, Vanguard (2019–present)

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Financial planner, Vanguard (2021–present); financial planner, Edward Jones (2019–2020); investment specialist, Edward Jones (2019)

**David Lindsay Sourk, CFP® (1968)**

B.S. Finance, The University of Arizona (1992)  
Financial planner, Vanguard (2022–present); sales consultant, Vanguard (2019–2022); assigned representative, Vanguard (2019)

**Eric John Spangenberg (1973)**

B.A. English literature, Arizona State University (2001)  
Manager, Vanguard (2022–present); supervisor, Vanguard (2019–2022)

**Thomas Ryan Sparkman, CFP® (1988)**

B.A. Economics, University of South Carolina (2011)  
Financial planner, Vanguard (2021–present); client case representative, Vanguard (2019–2021); inheritance specialist, Vanguard (2019)

**Nathan A. Spear, CFP® (1989)**

B.S.B.A Finance and banking/Risk management & insurance, Appalachian State University (2012)  
Financial planner, Vanguard (2019–present)

**Stephen J. Speers Jr., CFP® (1971)**

B.A. Business management, Gettysburg College (1994)  
Financial planner, Vanguard (2019–present)

**Joshua Spence (1980)**

B.S. Business administration, Lee University (2003)  
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Manager, Vanguard (2019–present)

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B.B.A. Finance, Temple University (2014)  
Financial planner, Vanguard (2019–present)

**Jared Spraggins, CFP® (1977)**

B.S. Business, University of Phoenix (2014)  
Financial planner, Vanguard (2023–present); senior manager – wealth advisor, Schwab Wealth Advisory (2020–2023); senior associate wealth advisor, Schwab Wealth Advisory (2019–2020)

**Dean Sprague, CFP® (1988)**

B.A. Sustainability, Arizona State University (2011)  
B.S. Supply chain management, Arizona State University (2011)  
Financial planner, Vanguard (2019–present)

**Lakshmi Srinivas, CFP® (1971)**

B.Com. Commerce, University of Delhi, India (1991)  
Financial planner, Vanguard (2022–present); Vanguard Return to Work intern, Randstad (2022); teacher assistant, Dunlap Community School District (2021–2022); extern, Financial Planning Association (2021); teacher assistant, Indian Prairie School District (2019–2021)

**Daniel Stafford, CFP® (1981)**

B.S. Finance, The University of Akron (2003)  
M.B.A., Queens University of Charlotte (2018)  
Financial planner, Vanguard (2022–present); divisional risk advisor, Vanguard (2020–2022); manager, Vanguard (2019–2020)

**Zachary Todd Staheli, CFP® (1995)**

B.S. Personal financial planning, Utah Valley University (2019)  
M.B.A., The Pennsylvania State University (2022)  
Manager, Vanguard (2023–present); financial planner, Vanguard (2020–2023); financial advisor development program, Vanguard (2019–2020); student developer, Utah Valley University (2019); intern, Diversify, Inc. (2019)

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B.B.A Trust management, Campbell University (2000)  
M.B.A., Campbell University (2000)  
Financial planner, Vanguard (2023–present); financial advisor/senior vice president – investments, Wells Fargo Advisors (2019–2023)

**Justin Stanford, CFP® (1992)**

B.A. Economics, California State University, Fullerton (2015)  
Financial planner, Vanguard (2022–present); dedicated outreach – senior sales consultant, Vanguard (2020–2021); senior sales consultant, Vanguard (2019–2020); assigned representative, Vanguard (2019)

**Robert Michael Starinsky, CFP® (1995)**

B.A. Financial economics and Business management, Wittenberg University (2017)  
Financial planner, Vanguard (2020–present); retirement specialist, Vanguard (2019–2020)

**Gary William Stark, CFP® (1988)**

B.S. Finance, William Paterson University (2013)  
Financial planner, Vanguard (2019–present)

**Vincent Stark, CFP® (1990)**

B.S. Finance, William Paterson University (2016)  
Financial planner, Vanguard (2021–present); client consultant, Vanguard (2019–2021); investment specialist, Vanguard (2019)

**Austin Collins Starrett (1993)**

B.A. Business finance, Piedmont College (2017)  
Financial planner, Vanguard (2021–present); financial advisor, Northwestern Mutual (2019–2020); financial advisor, Edward Jones (2019)

**Banner Reid Steele, CFP® (1996)**

B.S. Nutrition, Texas Tech University (2018)  
M.S. Personal financial planning, Texas Tech University (2020)  
Financial planner, Vanguard (2021–present); financial advisor development program, Vanguard (2020–2021); teaching assistant to the chancellor emeritus, Texas Tech University (2019–2020); summer associate, FJY Financial LLC (2019); executive assistant, First State Bank (2019)

**John Steele (1999)**

B.A. Finance, Washington State University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); line cook, Cougar Country Drive-In (2022); supervisor, Overlake Golf and Country Club (2019–2021); research intern, Washington Policy Center (2021)

**Garth Stefan, CFP® (1992)**

B.S. Business administration, Lebanon Valley College (2014)  
M.B.A., Loyola University (2018)  
Manager, Vanguard (2021–present); client engagement manager, T. Rowe Price (2019–2021)

**Maxwell James Steffey (1997)**

B.S. Political science and Religious studies, DePauw University (2020)  
Financial planner, Vanguard (2023–present); advisor support representative, Vanguard (2022–2023); portfolio implementation specialist, Vanguard (2021–2022); digital strategy intern, The Billfish Foundation (2020–2021); digital strategy intern, Wasserman Media Group (2019); development program participant, Los Angeles Sport and Entertainment Commission (2019); intern, Jeffrey A. Boggess, Attorney at Law (2019); lifeguard, DePauw University (2019–2020)

**Ryan W. Stender, CFP® (1979)**

B.S. Business administration, Duquesne University (2001)  
M.S. Interactive media, Duquesne University (2005)  
Financial planner, Vanguard (2019–present)

**Matthew Steslow (1987)**

B.B.A. Business management, Pennsylvania College of Technology (2009)  
M.B.A., California Lutheran University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); senior equipment operator, U.S. Well Services (2020–2022); service supervisor, U.S. Well Services (2019–2020)

**Brett Stewart (2000)**

B.S.B.A. Finance, Shippensburg University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); college financial representative intern, Northwestern Mutual (2021–2022); intern, Bradley Advisory (2019–2020); front end associate, Weiss Markets (2019–2022)

**Catherine (Walker) Stewart, CFP® (1984)**

B.S. Business administration, University of Florida (2006)  
Financial planner, Vanguard (2019–present)

**Thomas A. Stewart, CFP® (1973)**

B.A. History, University of Nevada, Las Vegas (1995)  
Financial planner, Vanguard (2022–present); market leader, Bank of America Merrill Lynch (2019–2022)

**Ianina D. Stolarz (1974)**

B.S. Economics, Universidad de San Andres (1998)  
M.B.A. Finance, New York University (2007)  
Financial planner, Vanguard (2021–present); Vanguard Return to Work intern, Randstad (2021)

**Matthew John Stouch, CFP® (1988)**

B.A. Advertising, The Pennsylvania State University (2011)  
Financial planner, Vanguard (2019–present)

**Phillip Stover, CFP® (1970)**

B.A. Finance, Ouachita Baptist University (1996)  
Financial planner, Vanguard (2022–present); financial consultant, Fidelity Investments (2019–2022)

**Aaron Stowe, CFP® (1988)**

A.B.A. Business, Paradise Valley Community College (2016)  
A.A., Paradise Valley Community College (2016)  
B.S. Finance, Arizona State University (2018)  
Financial planner, Vanguard (2022–present); advisor support representative, Vanguard (2021–2022); brokerage investment professional, Vanguard (2019–2021)

**Brian Michael Strange (1971)**

B.S. Business management, University of Phoenix (2006)  
Manager, Vanguard (2021–present); client services manager, Charles Schwab (2020–2021); financial planning and advice manager, USAA (2019–2020)

**Tyler Matthew David Strano, CFP® (1994)**

B.A. Economics, Ursinus College (2017)  
Financial planner, Vanguard (2020–present); client consultant, Vanguard (2019–2020); investment professional, Vanguard (2019)

**Stanley Strelsh Jr., CFP® (1977)**

B.A. History, The University of Scranton (1999)  
M.B.A., Arizona State University (2003)  
Financial planner, Vanguard (2019–present)

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B.A. Political science, Syracuse University (2004)  
Financial planner, Vanguard (2019–present)

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B.B.A. Finance, The University of Iowa (2006)  
Financial planner, Vanguard (2021–present); workplace planning consultant II, Fidelity Investments (2019–2021)

**Ramel Strong, CFP® (1985)**

B.S. Business administration, Florida A&M University (2010)  
M.B.A., Florida A&M University (2010)  
M.S. Wealth management, DePaul University (2016)  
Financial planner, Vanguard (2021–present); instructor, Kansas State University (2021); wealth strategist/senior associate, Diversified Trust (2019–2021)

**Nathan Niles Stumberg, CFP® (1997)**

B.S. Finance, The University of Arizona (2020)  
Financial planner, Vanguard (2022–present); client relationship associate, Vanguard (2020–2022); telephone outreach representative, Ruffalo Noel Loevitz (2019–2020); carrier sales intern, Echo Global Logistics (2019)

**Alan Stutman, CFP® (1979)**

B.S. Marketing, Drexel University (2002)  
Financial planner, Vanguard (2019–present)

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B.S. Commerce, University of Virginia (2006)  
Financial planner, Vanguard (2019–present)

**Katelyn Suda (1999)**

B.S. Finance, University of Wyoming (2020)  
B.S. Economics, University of Wyoming (2020)  
Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); client service associate, Principal Financial Group (2021); wealth management intern, Morgan Stanley (2020); server, Noon Rock Pizza (2019); assistant manager; Stagecoach Inn and Suites (2019)



**Margaret E. Sukonik, CFP® (1964)**

B.S. Health and human services administration, University of Scranton (1987)

M.A. Education, Rosemont College (2006)

Financial planner, Vanguard (2022–present); substitute teacher, Radnor School District (2021–2022); substitute teacher, AIM Academy (2020–2021); investment consultant, Fidelity Investments (2019–2020); client relationship manager, Portfolio Strategies team (2019)

**Chad Sundem, CFP® (1969)**

B.S. Business administration, Minnesota State University Mankato (1992)

Financial planner, Vanguard (2019–present)

**Glenn P. Suppanz, CFP® (1966)**

B.A. Economics, Rutgers University (1991)

M.B.A. International business, University of Miami (2000)

Financial planner, Vanguard (2019–present)

**Megan Nicole Sutula, CFP® (1995)**

B.S. Business administration, University of South Carolina (2017)

Financial planner, Vanguard (2020–present); retirement specialist, Vanguard (2019–2020)

**Sara L. Swearingen, CFP® (1986)**

B.A. Human communication, Arizona State University (2010)

Financial planner, Vanguard (2019–present)

**Sajid Ali Syed, CFP® (1955)**

B.S. Botany, Ranchi University (1976)

M.B.A., New York University (1988)

Financial planner, Vanguard (2022–present); financial advisor, Morgan Stanley (2019–2021); sales associate, Weichert Realtors (2019)

**Ty Nolan Tabile (1992)**

B.S. Finance, Brigham Young University – Hawaii (2021)

Financial planner, Vanguard (2022–present); financial representative, Northwestern Mutual (2020–2022); loss prevention associate, Ross (2020); solar sales manager, Vivint Solar (2020); handyman, Farnsworth Homes, Incorporated (2019); business owner, Cups and Cakes (2019); traveling member experience officer, Mountain America Credit Union (2019)

**Andrew Tamburro, CFP® (1989)**

B.S. Management, Clemson University (2012)

Financial planner, Vanguard (2019–present)

**Ronald Taraborrelli, CFP® (1973)**

B.A. Liberal arts, Cabrini University (2000)

Financial planner, Vanguard (2019–present); financial consultant, Fidelity Investments (2019)

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**David Tatich, CFP® (1967)**

B.A. History, Furman University (1989)

Financial planner, Vanguard (2019–present)

**Christopher James Tatton, CFP® (1993)**

B.S. Personal financial planning, Utah Valley University (2019)

Financial planner, Vanguard (2020–present); financial advisor development program, Vanguard (2019–2020)

**Daniel Tauriello, CFP® (1997)**

B.B.A. Finance and Financial planning, Temple University (2019)

Financial planner, Vanguard (2021–present); relationship manager, Forge Wealth Management (2019–2021); client services associate, Leon L. Levy & Associates (2019)

**Christopher Dorian Taylor (1991)**

B.S. Finance, California State University, Northridge (2021)

Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); accounts payable assistant, Gold's Gym SoCal (2019–2020); accounts payable processor, Robert Half Staffing Company (2019); performance and quality assurance specialist, Life Alert Emergency Response Inc. (2019)

**John Patrick Taylor, CFP® (1966)**

B.A. Economics, Rutgers University (1991)

Financial planner, Vanguard (2019–present)

**Wesley Charles Taylor, CFP® (1994)**

B.S.B.A. Finance, The University of North Carolina at Charlotte (2017)

Financial planner, Vanguard (2021–present); client relationship consultant, Vanguard (2019–2021); investment specialist, Vanguard (2019)

**Christopher Tave (1972)**

B.B.A. Finance, University of North Texas (2005)

Financial planner, Vanguard (2022–present); senior financial advisor, Gann (2020–2022); financial advisor, Chelsea Financial Services (2019–2020); financial consultant, TD Ameritrade (2019)

**Vahan G. Teberian, CFP® (1984)**

B.A. Communication arts and sciences, The Pennsylvania State University (2006)

Financial planner, Vanguard (2019–present)

**Michael Teed, CFP® (1968)**

B.B.A. Finance, Texas A&M University (1994)

Financial planner, Vanguard (2021–present); managed solutions consultant, Fidelity Investments (2019–2021)

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B.A. Interdisciplinary studies, Arizona State University (2018)

Financial planner, Vanguard (2019–present)

**Paloma Hula Thom (1996)**

B.S. Agricultural and applied economics, Texas Tech University (2020)

M.S., Personal financial planning, Texas Tech University (2021)

Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); intern, Robertson Stephens (2021); graduate teaching assistant, Texas Tech University (2020–2021); student assistant, Texas Tech University (2019–2020); clinical liaison, The Ranch at DoveTree (2019–2020)



**Andrew Scott Thomas, CFP® (1983)**

B.B.A Business, The University of Texas at Arlington (2006)  
Financial planner, Vanguard (2021–present); financial planning consultant, First Command Financial (2020–2021); strategic marketing consultant, First Command Financial (2019–2020); wealth manager, Leap Wealth Management (2019)

**Nicholas Thomas, CFP® (1991)**

B.S. Athletic training, Kent State University (2013)  
M.S. Instructional leadership, Robert Morris University (2016)  
Financial planner, Vanguard (2021–present); client representative, Vanguard (2020–2021); financial advisor, Edward Jones (2019–2020); certified athletic trainer, Cleveland Clinic (2019)

**Tanner Thorsrud, CFP® (1995)**

B.S. Business management, The University of Arizona (2017)  
Financial planner, Vanguard (2020–present); asset transfer specialist, Vanguard (2019–2020)

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B.S. Finance and Economics, Old Dominion University (2012)  
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B.S. Business administration, College of Charleston (2000)  
Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2024–present); advance to financial planning associate, Vanguard (2023–2024); client care representative, Vanguard (2021–2023); senior account specialist, Citadel Credit Union (2019–2021); account specialist, Citadel Credit Union (2019)

**John Robert Timko, CFP® (1981)**

B.S. Business and Economics, Lehigh University (2003)  
Manager, Vanguard (2019–present)

**Joseph Michael Timmons, CFP® (1998)**

B.B.A. Finance, East Carolina University (2020)  
Financial planner, Vanguard (2022–present); client representative, Vanguard (2021–2022); client onboarding specialist, Vanguard (2020–2021); client relationship associate, Vanguard (2020); bank teller, First Bank (2019–2020); financial analyst intern, Thermo Fisher Scientific (2019)

**Scott Tinsley, CFP® (1980)**

B.A. History, Arizona State University (2006)  
Financial planner, Vanguard (2020–present); client consultant, Vanguard (2019–2020); assigned representative, Vanguard (2019)

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B.S. Business management, Virginia Tech (2013)  
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**Antranik (Nik) V. Tomassian, CFP® (1975)**

B.S., Arizona State University (1998)  
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B.A. Business and economics, Hampden–Sydney College (2017)  
Manager, Vanguard (2019–present); process health intern, Vanguard (2019); resolution services associate, Vanguard (2019)

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B.S. Accountancy, Arizona State University (2010)  
B.S. Finance, Arizona State University (2010)  
M.S. Personal financial planning, College for Financial Planning (2020)  
Financial planner, Vanguard (2019–present)

**Patrick Toner (1997)**

B.S. Business management, Rowan University (2020)  
Financial planner, Vanguard (2022–present); client representative, Vanguard (2021–2022); manager trainee intern, Enterprise Car Rental (2019–2020); production associate, Philly Pretzel Factory (2019)

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B.S. Business management, James Madison University (2018)  
Financial planner, Vanguard (2021–present); portfolio implementation specialist, Vanguard (2019–2021); retail inheritance specialist, Vanguard (2019)

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B.B.A. Management, Southwestern Oklahoma State University (2004)  
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Financial planner, Vanguard (2022–present); financial consultant, Charles Schwab (2020–2022); wealth manager, USAA (2019–2020)

**Nicholas Tracy, CFP® (1997)**

B.S. Business administration, The State University of New York at Buffalo (2020)  
Financial planner, Vanguard (2022–present); sales consultant, Vanguard (2021–2022); registered administrative assistant, Goodwin Insurance Agency (2019–2021)

**Damon Trammell (1964)**

B.B.A., University of North Texas (1986)  
Manager, Vanguard (2023–present): Financial planner, Vanguard (2022–2023); financial advisor, Little & Associates Wealth Management (2021–2022); agency business consultant, Farmers Insurance Group (2019–2021)

**Todd Adam Truitt, CFP® (1982)**

B.S. Accounting, Ball State University (2005)  
M.B.A., Ball State University (2006)  
Manager, Vanguard (2019–present)

**Timothy J. Traut, CFP® (1972)**

B.S. Business administration, Utica College of Syracuse University (1994)  
Financial planner, Vanguard (2019–present)

**Steven Trevor, CFP® (1966)**

B.S. Finance, Clarkson University (1988)  
M.B.A. General management, Western Governors University (2018)  
Financial planner, Vanguard (2021–present); vice president – financial consultant, Charles Schwab & Co. Inc. (2020–2021); wealth manager, USAA (2019–2020)

**Allie Trimble, CFP® (1998)**

B.S. Financial planning and wealth management, University of Delaware (2020)  
Financial planner, Vanguard (2021–present); financial advisor development program, Vanguard (2020–2021); advice intern, Randstad (2019); seasonal intern, Kennedy Investment Group (2019)

**Russell John Trombley, CFP® (1987)**

B.S. Business management, The University of Arizona (2011)  
Financial planner, Vanguard (2019–present)

**Gail Marjorie Tshudy, CFP® (1960)**

B.A. Christian education, Messiah College (1982)  
Financial planner, Vanguard (2019–present)

**Elaine Turner, CFP® (1997)**

B.B.A., Queens University of Charlotte (2020)  
Financial planner, Vanguard (2022–present); brokerage associate, Vanguard (2021–2022); client relationship associate, Vanguard (2020–2021); marketing intern, Capture Public Relations and Marketing (2019)

**G. Taylor Turner, CFP® (1989)**

B.S. Finance, Arizona State University (2012)  
Financial planner, Vanguard (2019–present)

**Phillip Robert Turner, CFP® (1987)**

B.S. Business administration, The University of North Carolina at Wilmington (2010)  
M.B.A., East Carolina University (2014)  
Financial planner, Vanguard (2019–present)

**Walter Edward Tuttle (1974)**

A.A.S. Business administration technology, Delaware Technical Community College (1995)  
B.S. Management, University of Phoenix (2018)  
Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021)

**David Fitzgerald Van Brunt, CFP® (1991)**

B.A. Philosophy, Franciscan University of Steubenville (2013)  
M.B.A., Benedictine University at Mesa (2017)  
Financial planner, Vanguard (2020–present); retirement specialist, Vanguard (2019–2020); investment representative, Vanguard (2019)

**Soren Van Houten (1998)**

B.S.B.A. Finance, Creighton University (2021)  
B.S.B.A. Marketing, Creighton University (2021)  
Financial planner, Vanguard (2022–present); specialty flex associate, Vanguard (2021–2022); portfolio manager, Creighton University Student Endowment (2020–2021); finance intern, Farm Credit West (2020); corporate intern, VIP Mortgage, Inc. (2019); student development officer, Creighton University (2019); men's basketball manager, Creighton Athletics (2019–2021)

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Financial planner, Vanguard (2021–present); client representative, Vanguard (2020–2021); orders client representative, Vanguard (2019–2020); investment professional, Vanguard (2019); brokerage investment professional, Vanguard (2019)

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Manager, Vanguard (2020–present); lean navigator, Vanguard (2019–2020); financial planner, Vanguard (2019)

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Financial planner, Vanguard (2022–present); portfolio consultant, TD Ameritrade Investment Management (2019–2022)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2023–present); Vanguard Return to Work intern, Randstad (2022); mortgage loan officer, Angel Oak Home Loans (2022); mortgage underwriter, Better.com (2021–2022); mortgage loan expert, Better.com (2019–2021); senior loan consultant, Ally Bank (2019)

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B.S. Finance, University of Pittsburgh (2010)  
Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2021–present); fixed income specialist, Vanguard (2019–2021)

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B.S. Financial planning and Consumer economics, University of Georgia (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); student tutor, University of Georgia Athletic Association (2022); ski instructor, Killington Ski Resort (2019–2022); banquet server, Killington Ski Resort (2019)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2019–present)

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Wolford College (2008, non–degree)  
B.S. Legal studies, University of Central Florida (2012)  
M.B.A., Florida State University (2013)  
Financial planner, Vanguard (2022–present); independent contractor, Vivi International LLC (2021–2022); vice president, financial consultant, SunTrust Investment Services (2019–2021); senior client service associate, UBS Financial Services (2019)

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B.S. Economics, Arizona State University (2007)  
B.S. Business management, Arizona State University (2007)  
M.B.A., Grand Canyon University (2013)  
Financial planner, Vanguard (2022–present); advisor support representative, Vanguard (2021–2022); specialty flex associate, Vanguard (2019–2021)

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Manager, Vanguard (2019–present)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2020–present); business project specialist, Vanguard (2019–2020)

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B.S. Finance and economics, Gardner-Webb University (2017)  
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Financial planner, Vanguard (2024–present); investment analyst, Vanguard (2019–2024); fixed income specialist, Vanguard (2019)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2022–present); financial planner, Edward Jones (2020–2022); financial planner, USAA (2019–2020)

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B.S. Business, Purdue University (1986)  
M.B.A., Southern Methodist University (1993)  
Financial planner, Vanguard (2023–present); Vanguard Return to Work intern, Randstad (2022–2023)

**Greg Warburton, CFP® (1959)**

B.A. Economics, Lafayette College (1981)  
Financial planner, Vanguard (2019–present)

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B.S. Accounting, The University of Arizona (2005)  
Financial planner, Vanguard (2019–present)

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A.A. Business, Strayer University (2010)  
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Financial planner, Vanguard (2022–present); senior client service associate, JPMorgan Private Bank (2022); financial representative, Fidelity Investments (2019–2021)

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B.S. Business management, Arizona State University (2015)  
Financial planner, Vanguard (2019–present)

**Nieda Washington (1974)**

Manor College (1993, non–degree)  
Community College of Philadelphia (2000–2002, non–degree)  
Rosemont College (2002–2003, non–degree)  
Financial planner, Vanguard (2021–present); tax associate, H&R Block (2020)

**Jasson Waters (1977)**

University of Michigan (2003–2005, non–degree)  
Financial planner, Vanguard (2021–present); customer advocate, TIAA (2019–2020)

**Tyler Waters (1991)**

B.B.A. Finance, Francis Marion University (2014)  
B.B.A. Management, Francis Marion University (2014)  
Financial planner, Vanguard (2020–present); financial advisor, Edward Jones Investments (2019–2020)

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Financial planner, Vanguard (2021–present); premier banker, Wells Fargo (2020–2021); wealth management advisor, TIAA (2019–2020)

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B.S. Finance, Arizona State University (2016)  
Financial planner, Vanguard (2021–present); client consultant, Vanguard (2019–2021); client service specialist, Vanguard (2019)

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B.A. Economics, Gettysburg College (2019)  
Financial planner, Vanguard (2021–present); financial solutions advisor, Merrill Edge (2021); investment specialist, Merrill Edge (2020–2021); financial services representative, Merrill Edge (2019–2020)

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Financial planner, Vanguard (2022–present); client consultant, Vanguard (2021–2022); financial planner, Aventus Advisors, Inc. (2019–2021)

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Financial planner, Vanguard (2021–present); financial advisor, Edward Jones (2019–2021)

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Manager, Vanguard (2024–present); Financial planner, Vanguard (2019–2024); financial advisor development program, Vanguard (2019)

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Financial planner, Vanguard (2022–present); senior manager, Charles Schwab (2020–2022); senior manager, USAA (2019–2020)

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B.A. Liberal arts, Arizona State University (2009)  
Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2020–present); wealth management advisor, TIAA (2019–2020)

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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2023–present); director of sales, Facet Wealth (2022–2023); senior financial planner, Facet Wealth (2021–2022); senior wealth advisor, Clarfeld (2020–2021); wealth management advisor, TIAA (2019–2020)

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B.A. History, Ursinus College (2010)  
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Financial planner, Vanguard (2019–present)

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Manager, Vanguard (2019–present)

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Manager, Vanguard (2019–present)

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Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021)

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B.S. Finance, The University of Alabama (2021)  
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); transportation policy researcher, Alabama Transportation Institute (2019–2021); student teacher, The University of Alabama (2019)

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Financial planner, Vanguard (2021–present); private client advisor, JPMorgan Chase (2020–2021); financial advisor associate, Morgan Stanley (2019–2020)

**Thomas White (1999)**

B.S. Finance, Fordham University (2021)  
Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); title insurance post closer, Members Settlement Services, LLC (2019–2021); wealth management intern, Allied Millennial Partners, LLC (2019)

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B.A. Political science and Sociology, Furman University (2006)  
Financial planner, Vanguard (2019–present)



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Manager, Vanguard (2019–present)

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B.A. Communications, Coker University (2004)  
Financial planner, Vanguard (2021–present); relationship manager, Vanguard (2019–2021)

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B.S.B.A. Financial planning, Liberty University (2020)  
Financial planner, Vanguard (2022–present); change-of-ownership specialist, Vanguard (2021–2022); client relationship associate, Vanguard (2020–2021); dedicated business owner, Target (2019–2020)

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B.S. Finance, University of Delaware (2015)  
Financial planner, Vanguard (2019–present)

**Tanner Wiese (1997)**

B.S. Business administration, University of Oregon (2020)  
Financial planner, Vanguard (2022–present); client representative, Vanguard (2021–2022); personal banker, Key Bank (2021); agency sales intern, Country Financial (2020–2021); intern, A Family For Every Child (2019–2020)

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B.A. Fine arts, The University of Arizona (1984)  
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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2019–present); portfolio implementation associate, Vanguard (2019)

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Financial planner, Vanguard (2024–present); advance to financial planning associate, Vanguard (2023–2024); written correspondence client representative, Vanguard (2021–2023); support lead, Vanguard (2021); client relationship associate, Vanguard (2020–2021); founder, Fresh Start Cleaning Company (2019–2020)

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B.S. Finance and economics, Grand Canyon University (2017)  
Financial planner, Vanguard (2020–present); investment associate, Vanguard (2019–2020); brokerage investment professional, Vanguard (2019)

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Financial planner, Vanguard (2021–present); supervisor, Vanguard (2019–2021); client relationship administrator, Vanguard (2019)

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Financial planner, Vanguard (2019–present)

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B.S. Finance, Arizona State University (2022)  
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); finance intern, Edupoint Educational Systems (2021); utility, Sauce Pizza and Wine (2019–2021); server, Sauce Pizza and Wine (2019)

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Financial planner, Vanguard (2019–present); account transition specialist, Vanguard (2019)

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Financial planner, Vanguard (2019–present); operations service administrator, Vanguard (2019); brokerage professional, Vanguard (2019)

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Manager, Vanguard (2019–present)

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Manager, Vanguard (2021–present); financial planner, Vanguard (2019–2021); wealth management advisor, TIAA (2019)

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M.S. Financial planning, College for Financial Planning (2023)  
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Financial planner, Vanguard (2019–present)

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M.T. Taxation, Villanova University (2009)  
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M.Ed. Elementary education, Converse College (1995)  
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Manager, Vanguard (2019–present)

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Financial planner, Vanguard (2022–present); financial planner, Merrill Lynch (2019–2021)

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Financial planner, Vanguard (2020–present); financial advisor, Fullerton Financial Planning (2019–2020); associate private client advisor, Schwab Private Client Investment Advisory, Inc. (2019)

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Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); campus recreation student associate, University of Illinois Urbana–Champaign (2021–2022); financial wellness peer educator, University of Illinois Urbana–Champaign (2020–2022); crew member, Potbelly Sandwich Shop (2020–2022); café supervisor, Lifetime Fitness (2019)

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Financial planner, Vanguard (2022–present); office manager, Springs Capital North America LLC (2021–2022); property manager, ACRE Real Estate LLC (2019–2021); product manager, Xiong Hai Zi Online Education LLC (2019)  
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Manager, Vanguard (2022–present); financial planner, Vanguard (2021–2022); financial advisor development program (2020–2021); advice intern, Randstad (2019); bookkeeper, Lester Martin Jewelers (2019)

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## Disciplinary information

Other than those included with a financial planner's information above, there are no material legal or disciplinary events to disclose for the financial planners listed.

## Other business activities

Other than those included with a financial planner's information above, there are no business activities to disclose for the financial planners listed.

## Additional compensation

The advice provided by our financial planners does not vary based on whether Vanguard or any of its affiliates or subsidiaries will receive fees from any recommendations to purchase, hold, or sell Vanguard Funds or non-Vanguard investments. The financial planners are not compensated for, or on the basis of, any recommendation or sales of specific securities. Financial planners who deliver advice to clients are paid base compensation (either salary/exempt or hourly/non-exempt wages) and are eligible for an annual payment from an enterprise-wide compensation plan. Financial planners who are exempt employees of Vanguard are also eligible to receive an annual discretionary bonus. Please see the "Advisor compensation" section of the Personal Advisor Select Brochure for more details related to compensation practices.

## Supervision

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Financial planners' recorded calls, emails, and written advice are monitored by random sample. Results of the monitoring are reviewed with the individual planner by his or her direct supervisor and are reviewed in aggregate at the department level by the department head.

Verification that the monitoring is taking place as required is reviewed in aggregate at the department level by the department head.

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**Douglas Mento (1975)**, a principal and head of Vanguard Advice, is the person responsible for supervision of the financial planners. He joined Vanguard in 2005 and has held positions as head of Bank and Institutional (2022–2024), head of Specialized Retail Programs (2018–2022), head of Retail Strategic Support (2017–2018), head of Flagship Personal Advisor Services (2015–2017), and head of Advice Services Group (2014–2015). Mr. Mento earned a B.S. from Lehigh University and an M.B.A. from Saint Joseph's University.

If you have any questions about our services, please call 844-899-0113 and leave your name and a phone number where you can be reached. A member of our management team will contact you within two business days. Please note, this document is not intended for you to select a specific advisor. As part of our services, Vanguard will align you with an advisor.

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