



Team Directory

Always ready to serve you.
517-435-4040

**OUR PROMISE TO YOU: REACH OUT TO US BEFORE 3 PM AND WE WILL RESPOND SAME DAY;
AFTER 3 PM, WE WILL RESPOND BY 12 PM FOLLOWING DAY (EASTERN TIME)**

- Unsure of who to contact? We will direct you
- Schedule your visit with our team



Sally, Director of First Impressions
517-435-4037 | sally@richmondbrothers.com

- Introduce us to a friend/family member
- Event questions or registration
- Feedback about events and communications



Kira, Director of Marketing & Events
517-435-4025 | kira@richmondbrothers.com

- Banking Instructions
- Beneficiary Updates
- Tax Questions
- Conversions
- Death notifications
- Add/Withdraw Funds



Alexis, Client Service Specialist
517-435-4022 | alexis@richmondbrothers.com

- Annuity Questions
- Fidelity Applications
- Rollovers
- RMDs (Required Minimum Distributions)
- Stock trades



Lindsay, Client Service Specialist
517-435-0469 | lindsay@richmondbrothers.com

- 10% Penalty-Free Annuity Withdrawals
- Stock trades
- Portfolio Check In Reports
- Income annuities



Cindy, Director of Transfers & Reporting
517-435-4035 | cindy@richmondbrothers.com

- Open new accounts
- Transfer new accounts
- Annuity applications
- Rollovers
- Stock trades



Riley, New Business Associate
517-435-4033 | riley@richmondbrothers.com

- Tax questions
- Stock trades
- Add Funds
- RMDs (Required Minimum Distributions)
- Withdraw Funds



Stephanie, Director of Client Relations
517-435-4030 | stephanie@richmondbrothers.com

- Send updated statements, pension estimates, 401k balances, or Social Security figures before meeting
- Life change updates



Jessica, Director of Advisor Support
517-435-4035 | jessica@richmondbrothers.com

- Questions on portfolio



Steve, Associate Financial Advisor
517-435-4026 | steve@richmondbrothers.com

- Questions on portfolio and overall strategy



Dan, Senior Financial Advisor
517-435-4032 | dan@richmondbrothers.com

- Feedback on service and communications



Tara, COO & Co-Owner
517-435-0427 | tara@richmondbrothers.com

- Questions on portfolio and overall strategy



Matt, CEO & Co-Owner
517-435-4029 | matt@richmondbrothers.com

- Questions on private equity funds



Dave, Chairman & Co-Owner
517-435-4021 | dave@richmondbrothers.com

*Please note: This is not a complete list of duties or team members, but a guide to help you determine who to contact.
We are happy to direct you to the correct team member at all times.*