



Advisor Offices

Arizona

William Wheeler, CPA/PFS, CFP®
9375 E. Shea Blvd., Suite 100
Scottsdale, AZ 85260
480-661-8350
AZ, CA, FL
william.wheeler@symphonicfa.com

Colorado

Tim Kulick, CPA, PFS
Mitchell, Kulick & Company
7340 E. Caley Ave., Suite 340W
Centennial, CO 80111
303-740-8488
CO,
tim.kulick@symphonicfa.com

California

Gloria Birnkrant, CPA
Eileen Cohen, CPA
Barbara Kogen, CPA
Marlene Putterman, CPA
NSBN, LLP
9454 Wilshire Blvd., 4th Floor
Beverly Hill, CA
310-288-4292
CA, TN, TX
gloria.birnkrant@symphonicfa.com

Florida

Russell Lindsay, CPA
Lindsay Financial Services LLC
3301 SW 34th Circle
Ocala, FL 34474
352-369-1120
FL, KY
russell.lindsay@symphonicfa.com

Florida

William Munrow
M&M Insurance Solutions
4115 Mariner Blvd.
Spring Hill, FL 34609
352-686-0986
FL
william.munrow@symphonicfa.com

Mark Fenton
GrowthNet Wealth Management
3085 Windsong Court, #903
Naples, FL 34109
239-591-3978
FL, GA, IL, OH, SC
mark.fenton@symphonicfa.com

Maryland

Audrey Drossner, CPA
Meg Anderson
Karen Sanchez
Oracle Capital Strategies, LLC
2330 W Joppa Rd., Suite 100
Lutherville, MD 21093
410-878-7002
AZ, DE, DC, FL, MD, VA
audrey.drossner@symphonicfa.com
meg.anderson@symphonicfa.com

Minnesota

Eugene von Mosch, CFP®
Judith von Mosch
405 E. Superior Street, Suite 245
Duluth, MN 55802
218-625-1735
KS, MN, NC, ND, VA, WA, WI
gene.vonmosch@symphonicfa.com
judith.vonmosch@symphonicfa.com



Symphonic
FINANCIAL ADVISORS

Missouri

D. Marc Brookings, AIF®, CMFC
1504 N. Church Road, Suite B
Liberty, MO 64068
816-781-2200
AR, FL, KS, MO
marc.brookings@symphonicfa.com

Shelly Hall-Peterson, AIF®
1504 N. Church Rd., Suite B
Liberty, MO 64068
816-781-2200
FL, KS, ME, MA, MO, OK
shelly.peterson@symphonicfa.com

Rob Robinson
1504 N. Church Rd., Suite B
Liberty, MO 64068
816-781-2200
MO, KS, OK
robert.robinson@symphonicfa.com

Nebraska

Daniel Monaghan, CFP®
403 G. Street, Suite 100
Central City, NE 68826
308-946-3034
AK, AZ, CO, FL, IA, KS, MS, MO, NE, SD, WY
dan.monaghan@symphonicfa.com

Oregon

Loren Harwood, CPA, CFP®
Loren B. Harwood, CPA, LLC
1944 Sherman Avenue, Suite 201
PO Box 622
North Bend, OR 97459
541-756-1515
OR
loren.harwood@symphonicfa.com

Wisconsin

Mary Schwartz, CFP®
49 Kessel Court, Suite 202
Madison, WI 53711
608-442-1500
CO, GA, IL, IA, MN, NJ, VA, WI
mary.schwartz@symphonicfa.com

Texas

Juanita Causey, CFP®, CLU®,
ChFC®, AIF®, LUTCF
Houston Financial Center
675 Bering Drive, Suite 575
Houston, TX 77057
713-212-7565
CA, CO, FL, IL, KS, KY, LA, MD, MS, MO,
NJ, NC, OH, SC, TX, VA
jcausey@houstonfinancialcenter.com

Rick Clopton, CPA/PFS
Clopton Financial Services
107 N. Goliad, Suite 101
Rockwall, TX 75087
972-772-0987
AR, OK, TX
rick.clopton@symphonicfa.com

Angela Ruddock, CFP®
1002 E. Main Street
Rockport, TX 78382
361-729-2977
GA, IN, MO, NY, OH, SC, TN, TX
angela.ruddock@symphonicfa.com

Tony Simmons, CFP®, LUTCF
Tony Simmons Financial Services
183 CR 612
Nacogdoches, TX 75964
936-560-2622
TX
tony.simmons@symphonicfa.com