MEET YOUR PERSONAL SERVICE TEAM

We are pleased to introduce to you the ***Michael W. Conway concierge service team***. For your convenience, our team's contact information is listed to the right. Next time you visit our office, please stop by and meet our team.

Front Row/Left to Right:
Laura Flynn, Appointment Liaison
Victor Maccagnan, MBA, CFP®, ChFC, CIMA, Director of Wealth Planning
Michael W. Conway, CFP®, ChFC, Principal
Michele Babakian, MBA, CRPC, FPS, Vice President of Wealth Management

Back Row/Left to Right:
Sharon Fulgenzi, Operations Specialist, ***Ken Kovacs***, Director of Communications, ***Wayne Wunderlich***, Appointment Liaison, ***Nancy Chung***, Director of Client Services, ***Carolyn Schneider***, Executive Assistant.

In addition to Michael's team, he has 16 partners in the firm and 200 plus seasoned professionals that support the back office operations of Summit Financial Resources, Inc. These professionals include CPAs, attorneys, benefit specialists, paraplanners, and insurance experts who help our team to better customize key strategies and to meet our clients evolving financial needs.

Service Philosophy:

Perhaps at no other time in history have individuals and families felt the need for an in depth team approach in planning their financial affairs. The information to absorb and decipher is massive. Regulation and markets are constantly changing. You require quick responses to your questions and problems, and only through a dedicated team of professionals can key information be analyzed, appropriate recommendations be made, and prompt and efficient service be given to your needs.

Office of Michael W. Conway At A Glance

- ***Carolyn Schneider,***
  Executive Assistant
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- ***Sharon Fulgenzi,***
  Operations Specialist
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- ***Nancy Chung,***
  Director of Client Services
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  Em: nchung@sfr1.com

- ***Victor Maccagnan, CFP®, MBA***
  Director of Wealth Planning
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- ***Michele Babakian, MBA, CRPC, FPS***
  Vice President Wealth Management
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- ***Michael W. Conway, CFP®, ChFC***
  and Principal
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- ***Ken Kovacs,***
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- ***Wayne Wunderlich,***
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- ***Jan Kudder,***
  Appointment Liaison
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- ***Laura Flynn,***
  Appointment Liaison
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  Em: lflynn@sfr1.com

To this end, our goal is to be the premier wealth management and financial planning team to high net worth individuals and families by *providing cutting edge strategies and stellar service.* When you call our office, our goal is to provide you with friendly and courteous service that solves your problem or concern correctly the first time. *(over)*

Service Team Specialties

Carolyn Schneider, Executive Assistant, will usually be your first contact upon calling our office. During our normal business hours of 8:30 am to 5:15 pm, Carolyn is your direct link to Michael and his staff. She will direct you to the best qualified member of Michael's team to assist you with your requests. She can schedule appointments, do wire transfers, prepare checks, compile your investment reports, and answer questions about your account(s).

Sharon Fulgenzi, Operations Specialist, can help guide you through the complex process of underwriting when a particular insurance need arises. Sharon will contact you regarding scheduling your medical or telephone interview, as required by the underwriting process, and coordinates your policy for delivery. She also assists with the executive assistant duties in Carolyn's absence, as well as preparing wire transfers and checks, compiling investment reports, and answering questions about your account.

Nancy Chung, Director of Client Services, provides unique family office services to our clients, such as mortgage analysis and credit check reviews, bill paying services, and other personal requests. She oversees the massive flow of "lifestyle detail" that most advisor teams do not have the time or expertise to handle. She plays an integral part in implementing our concierge team service strategy.

Ken Kovacs, Director of Communications, and Wayne Wunderlich, Jan Kudder, and Laura Flynn, Appointment Liaisons ensure that all of the technical systems that I have in place flow smoothly to better serve you. When I need to get information out to my clients in a hurry--rest assured, whenever a client hears from one of them--it's at my request. They will help set up seminars and client briefings, schedule appointments, coordinate my newsletter, and make sure that all client contact records are accurately updated. Ken also coordinates the set up of your *customized web site*, or Wealth Aggregation Model™, which keeps you informed in real time, 24/7 from anywhere in the world, of all your on-line account balances.

Victor Maccagnan, MBA, CFP®, ChFC, CIMA, Director of Wealth Planning, is responsible for assembling all of the detailed planning modules for your comprehensive and integrated financial plan. He helps ensure that all of the recommended planning strategies that you and Michael agree on are executed to your satisfaction. The complex planning process requires Victor to frequently communicate with your attorneys, accountants, and company benefit departments when information is needed for our customized proposals.

Michele Babakian, MBA, CRPC, FPS, Vice President of Wealth Management, is responsible for implementing and reviewing each client's investment strategy, and providing a personalized solution that incorporates the client's goals and risk tolerance. Establishing and maintaining the portfolio's accounts, rebalancing, tax loss harvesting, and style drift analysis are all key areas of concern. She has had portfolio management positions at several well known institutions including MetLife and Guardian Life Insurance Co.

Michael W. Conway, CFP®, ChFC, Principal, and Board Member is charged with the weighty responsibility of quarterbacking each client's financial plan and providing the solutions and advice to help them reach their financial goals. He is constantly striving to improve his knowledge of the industry through intensive study, research, and brain-storming with other professionals in the firm. His time revolves around three core functions: face to face meetings or conference calls with existing clients for their Integrated Wealth Review™ sessions, providing consultation as needed, and researching financial solutions and preparing proposals.

We believe in frequent communication, so you can expect to receive periodic updates, newsletters, questionnaires, and mailings from my office in addition to your periodic service reviews. With a concierge level service team and on-going contact, we are confident that you will be with us for many years to come.

WE LOOK FORWARD TO THE OPPORTUNITY TO BE OF SERVICE TO YOU!