



National Operational Excellence Council members

Established in 2022 with a mission to enhance your ease of doing business, the National Operational Excellence Council (NOEC) is comprised of Financial Professionals, administrative staff, operational firm leaders, and Osaic leadership. Members help identify and prioritize operational challenges and opportunities and serve as a collaborative resource in the decision-making process as enhancements are evaluated.

Below are the members of Osaic's National Operational Excellence Council:



Alissa Couchman
Iron Point Financial Advisors, Inc.



Margaret Cutter
Harman Wealth Management



Amber Carrick
Keystone Financial Management



Nick Burns
Financial Achievement Services, Inc.



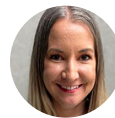
Barbara Marshall
ITP Partners



Nick Hanley
Acorn Financial Services



Chris Virgil
Evolution Financial Advisors



Rheannon Boddie
Infinity Financial Partners



Christian Bratton
Singletrack, LLC



Rob Schultz
NWF Advisory Services, Inc.



Erin Wilkinson
McCarthy Wealth Management



Ryan Helder
Steward Wealth



Kurt D. Jonson
Pacific Capital Resource Group, Inc.