Dimensional

# FIG Coverage Map

FOR INTERNAL USE ONLY

FOR INTERNAL USE ONLY

Dimensional

# Table of Contents


| Independents, Nationals and Wealth Tech Platforms | |
|---|---|
| 55ip | Nitrogen Wealth |
| Ameriprise | Oppenheimer |
| Baird | Orion |
| Betterment | Osaic |
| Cambridge | Pershing |
| Cetera | Raymond James |
| Edward Jones | RBC |
| Envestnet | Schwab |
| Fidelity | SEI |
| Janney | Stifel |
| Kestra | Vise |
| LPL | Wells Fargo |
| Morningstar | |

| Private Banks, Asset Managers and Insurance | |
|---|---|
| BlackRock | Manulife |
| BNY Mellon | Mass Mutual |
| Bank of America PB | Merrill |
| Capital Group | Morgan Stanley |
| Citi | Northern Trust |
| Deutsche Bank | Northwestern Mutual |
| Goldman Sachs | PIMCO |
| HSBC | UBS |
| JP Morgan | |

# Financial Institutions Group Team

Dimensional

For general inquiries, please contact GCG_FIG@dimensional.com or call (512) 306-4308.

**ED FOLEY**
Head of FIG & VP
Austin, Texas

## Independents, Nationals and Wealth Tech Platforms

**ROBYN ALCORTA**
Regional Director, Manager & VP
Austin, Texas

**RON KRISKO**
Regional Director & VP
Charlotte, North Carolina

**MAX WALKER**
Regional Director & Manager
Austin, Texas

## Research

**OLIVIA LAMAGNA**
Regional Director & VP
Austin, Texas

**SAM MORRISON**
Regional Director & VP
Santa Monica, California

## Private Banks, Asset Managers & Insurance

**ROBIN THOMPSON**
Regional Director, Manager & VP
Austin, Texas

**BARRETT BROWN**
Regional Director & VP
Charlotte, North Carolina

**TRACY MITCHELL**
Regional Director & VP
Austin, Texas

## CRG Team

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

**JILLIAN HEFNER**
Senior Associate
Austin, Texas

**DANNY MARTIN**
Associate
Austin, Texas

**ALEX MCLEOD**
Associate
Austin, Texas

**DAN WEAVER**
Analyst
Charlotte, NC

**ANDREW DOLLUS**
Analyst
Charlotte, NC

FOR INTERNAL USE ONLY

# Independents & Nationals

Edward Jones
Serving Individual Investors Since 1871

## Home Office

**MAX WALKER**
Regional Director & Manager
Austin, Texas

**ALEX MCLEOD**
Associate
Austin, Texas

## Research

Dimensional

**OLIVIA LAMAGNA**
Regional Director & VP
Austin, Texas

**DANNY MARTIN**
Associate
Austin, Texas

---

RBC

## Home Office

**MAX WALKER**
Regional Director & Manager
Austin, Texas

**JILLIAN HEFNER**
Associate
Austin, Texas

## Research

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

FOR INTERNAL USE ONLY

# Independents & Nationals

WELLS FARGO

## Home Office

**ROBYN ALCORTA**
Regional Director & VP
Austin, Texas

**ALEX MCLEOD**
Associate
Austin, Texas

**MAX WALKER**
Regional Director & Manager
Austin, Texas

## Research

Dimensional

**SAM MORRISON**
Regional Director & VP
Santa Monica, California

**DANNY MARTIN**
Associate
Austin, Texas

---

BAIRD

## Home Office

**MAX WALKER**
Regional Director & Manager
Austin, Texas

**ALEX MCLEOD**
Associate
Austin, Texas

**DAN WEAVER**
Analyst
Charlotte, NC

## Research

**OLIVIA LAMAGNA**
Regional Director & VP
Austin, Texas

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

FOR INTERNAL USE ONLY

# Independents & Nationals

Fidelity INVESTMENTS

## Home Office

**ROBYN ALCORTA**
Regional Director & VP
Austin, Texas

**ALEX MCLEOD**
Associate
Austin, Texas

**RON KRISKO**
Regional Director & VP
Charlotte, NC

## Research

Dimensional

**OLIVIA LAMAGNA**
Regional Director & VP
Austin, Texas

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

---

charles SCHWAB

## Home Office

**ROBYN ALCORTA**
Regional Director & VP
Austin, Texas

**ALEX MCLEOD**
Associate
Austin, Texas

**MAX WALKER**
Regional Director &
Manager
Austin, Texas

## Research

**SAM MORRISON**
Regional Director & VP
Santa Monica, California

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

FOR INTERNAL USE ONLY

# Independents & Nationals

ENVESTNET

LPL Financial

sei

## Home Office

**RON KRISKO**
Regional Director & VP
Charlotte, NC

**JILLIAN HEFNER**
Associate
Austin, Texas

**DAN WEAVER**
Analyst
Charlotte, NC

## Research

Dimensional

**OLIVIA LAMAGNA**
Regional Director & VP
Austin, Texas

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

---

RAYMOND JAMES

## Home Office

**ROBYN ALCORTA**
Regional Director & VP
Austin, Texas

**ALEX MCLEOD**
Associate
Austin, Texas

**RON KRISKO**
Regional Director & VP
Charlotte, NC

**DAN WEAVER**
Analyst
Charlotte, NC

## Research

**SAM MORRISON**
Regional Director & VP
Santa Monica, California

**DANNY MARTIN**
Associate
Austin, Texas

FOR INTERNAL USE ONLY

# Independents & Nationals

Betterment

## Home Office

**RON KRISKO**
Regional Director & VP
Charlotte, NC

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

## Research

Dimensional

**SAM MORRISON**
Regional Director & VP
Santa Monica, California

**DANNY MARTIN**
Associate
Austin, Texas

---

MORNINGSTAR®

## Home Office

**OLIVIA LAMAGNA**
Regional Director & VP
Austin, Texas

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

## Research

**SAM MORRISON**
Regional Director & VP
Santa Monica, California

**DANNY MARTIN**
Associate
Austin, Texas

FOR INTERNAL USE ONLY

# Independents & Nationals

osaic

Pershing®

## Home Office

**RON KRISKO**
Regional Director & VP
Charlotte, NC

**JILLIAN HEFNER**
Associate
Austin, Texas

**DAN WEAVER**
Analyst
Charlotte, NC

## Research

Dimensional

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

FOR INTERNAL USE ONLY

# Independents & Nationals

55ip
Cetera FINANCIAL GROUP
KESTRA FINANCIAL
Nitrogen
Orion FINANCIAL
vise

## Home Office

**RON KRISKO**
Regional Director & VP
Charlotte, NC

**JILLIAN HEFNER**
Associate
Austin, Texas

**DAN WEAVER**
Analyst
Charlotte, NC

## Research

Dimensional

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

---

Ameriprise Financial

## Home Office

**ROBYN ALCORTA**
Regional Director & VP
Austin, Texas

**MAX WALKER**
Regional Director & Manager
Austin, Texas

## Research

**DANNY MARTIN**
Associate
Austin, Texas

FOR INTERNAL USE ONLY

# Independents & Nationals

OPPENHEIMER

## Home Office

**MAX WALKER**
Regional Director & Manager
Austin, Texas

## Research

Dimensional

**SAM MORRISON**
Regional Director & VP
Santa Monica, California

**DANNY MARTIN**
Associate
Austin, Texas

---

STIFEL

## Home Office

**MAX WALKER**
Regional Director & Manager
Austin, Texas

**ALEX MCLEOD**
Associate
Austin, Texas

## Research

**DANNY MARTIN**
Associate
Austin, Texas

FOR INTERNAL USE ONLY

# Independents & Nationals

Janney

## Home Office

**MAX WALKER**
Regional Director & Manager
Austin, Texas

**DAN WEAVER**
Analyst
Charlotte, NC

**RON KRISKO**
Regional Director & VP
Charlotte, NC

## Research

Dimensional

**DANNY MARTIN**
Associate
Austin, Texas

---

CAMBRIDGE

## Home Office

**RON KRISKO**
Regional Director & VP
Charlotte, NC

**ANDREW DOLLUS**
Analyst
Charlotte, NC

## Research

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

FOR INTERNAL USE ONLY

# Private Banks, Asset Managers, & Insurance

MERRILL
A BANK OF AMERICA COMPANY

Morgan Stanley

UBS

## Home Office

**TRACY MITCHELL**
Regional Director & VP
Austin, Texas

**JILLIAN HEFNER**
Associate
Austin, Texas

**ROBIN THOMPSON**
Regional Director & VP
Austin, Texas

**DAN WEAVER**
Analyst
Charlotte, NC

## Research

Dimensional

**SAM MORRISON**
Regional Director & VP
Santa Monica, California

**DANNY MARTIN**
Associate
Austin, Texas

---

Northwestern Mutual®

## Home Office

**MAX WALKER**
Regional Director & Manager
Austin, Texas

**ALEX MCLEOD**
Associate
Austin, Texas

**DAN WEAVER**
Analyst
Charlotte, NC

## Research

**OLIVIA LAMAGNA**
Regional Director & VP
Austin, Texas

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

FOR INTERNAL USE ONLY

# Private Banks, Asset Managers, & Insurance

BANK OF AMERICA
PRIVATE BANK

## Home Office

**BARRETT BROWN**
Regional Director & VP
Charlotte, NC

**ANDREW DOLLUS**
Analyst
Charlotte, NC

PIMCO

**DAN WEAVER**
Analyst
Charlotte, NC

## Research

Dimensional

**SAM MORRISON**
Regional Director & VP
Santa Monica, California

**DANNY MARTIN**
Associate
Austin, Texas

---

Manulife
John Hancock

## Home Office

**BARRETT BROWN**
Regional Director & VP
Charlotte, NC

**JILLIAN HEFNER**
Associate
Austin, Texas

**ROBIN THOMPSON**
Regional Director & VP
Austin, Texas

## Research

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

FOR INTERNAL USE ONLY

# Private Banks, Asset Managers, & Insurance

BlackRock
BNY MELLON
CAPITAL GROUP®
Deutsche Bank
Goldman Sachs
HSBC
J.P.Morgan
MassMutual
NORTHERN TRUST

## Home Office

**BARRETT BROWN**
Regional Director & VP
Charlotte, NC

**ANDREW DOLLUS**
Analyst
Charlotte, NC

**DAN WEAVER**
Analyst
Charlotte, NC

## Research

Dimensional

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

---

citi

## Home Office

**BARRETT BROWN**
Regional Director & VP
Charlotte, NC

**JILLIAN HEFNER**
Associate
Austin, Texas

**ROBIN THOMPSON**
Regional Director & VP
Austin, Texas

**ANDREW DOLLUS**
Analyst
Charlotte, NC

## Research

**JOSEPH BELISLE**
Senior Associate
Austin, Texas

FOR INTERNAL USE ONLY