



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

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

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

Maryland

Audrey Drossner, CPA
Meg Anderson
Kevin Miller
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

Minnesota

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

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

Missouri

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



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

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

Angela Ruddock, CFP®

312 S. Austin Street

Rockport, TX 78382

361-729-2977

GA, IN, MO, NY, OH, SC, TN, TX

angela.ruddock@symphonicfa.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