



**FINANCIAL  
PLANNING  
ASSOCIATION**  
CONNECTICUT



December 18, 2024

## Sponsor Resource Directory

### Advisor Support & Services

#### Capital Group | American Funds

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Relationship Manager – RIA/BT (877) 421-1328

#### Charles Schwab

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#### Vanguard Financial Advisor Services

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### Annuities

#### Allianz Life

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#### DPL Financial Partners

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#### PGIM Investments

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### Insurance Planning

#### Emerald Medicare

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Director of Medicare (845) 358-1220

#### Professional Life Advisors Network

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Insurance Planning Specialist (860) 874-2750

**Insurance  
Services**

**DPL Financial Partners**

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**Emerald Medicare**

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**Investment  
Management  
Active Emphasis**

**Capital Group | American Funds**

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**Harbor Capital Advisors**

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**Hartford Funds**

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**Nationwide Investment Management Group**

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**T. Rowe Price Investment Services**

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**Voya Investment Management**

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**Investment  
Management  
ETF Emphasis**

**State Street Global Advisors SPDR ETFs**

Timothy "Tim" Brock, CFP®, CIMA®  
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**Investment  
Management  
Growth Emphasis**

**Baron Capital**

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**T. Rowe Price Investment Services**

Gregory Marlowe

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**Investment  
Management**  
*Passive Emphasis*

**State Street Global Advisors SPDR ETFs**

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**Vanguard Financial Advisor Services**

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**Investment  
Management**  
*Risk Emphasis*

**Calamos Investments**

Paul Giovanniello, CIMA® [pgiovanniello@calamos.com](mailto:pgiovanniello@calamos.com)  
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**LoCorr Funds**

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**PGIM Investments**

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**Investment  
Management**  
*Specialist Emphasis*

**Advisors Asset Management**

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**Allspring Global Investments**

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**Calamos Investments**

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**Eaton Vance**

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**Investment  
Management**  
*Real Estate & Other  
Real Assets Emphasis*

**Cohen & Steers**

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**Investment  
Management**  
*Value Emphasis*

**Fenimore Asset Management, Inc. | FAM Funds**

William "Billy" Wise [wwise@fenimoreasset.com](mailto:wwise@fenimoreasset.com)  
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**Legal Services**  
*Estate Planning & Elder  
Law*

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**Czepiga Daly Pope & Perri**

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**Wiggin and Dana**

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Erin Nicholls [enicholls@wiggin.com](mailto:enicholls@wiggin.com)  
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**Legal Services**  
*General*

**Wiggin and Dana**

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**Security Services**  
*Cybersecurity*

**Kyber Security**

Michael Giuffrida [mgiuffrida@kybersecure.com](mailto:mgiuffrida@kybersecure.com)  
President (203) 333-4444 x113

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