

# HARBOUR STAFF DIRECTORY

Dialing a direct line bypasses our automated system, while dialing Harbour's main number puts you into our automated call processing system. You can immediately dial the phone number, or extension, of the individual you are trying to reach (*extensions are last 3 numbers of direct line listed below*) or \* for a company directory. The directory works by first or last name. Specialties and email addresses have been added for your convenience.

**Main phone:** (608) 662-6100

**Fax:** (608) 662-6116

(608) 662-6101

**\*\*emergency fax ONLY\*\***

## Department Phone Banks

Press the number to reach...

0 = Operator

2 = Trading & Transaction Dept

3 = Recruiting

## Department Emails

[advisory@harbourinv.com](mailto:advisory@harbourinv.com)

[atlas@harbourinv.com](mailto:atlas@harbourinv.com)

[commissions@harbourinv.com](mailto:commissions@harbourinv.com)

[events@harbourinv.com](mailto:events@harbourinv.com)

[licensing@harbourinv.com](mailto:licensing@harbourinv.com)

[morningstar@harbourinv.com](mailto:morningstar@harbourinv.com)

[newbusiness@harbourinv.com](mailto:newbusiness@harbourinv.com)

[technology@harbourinv.com](mailto:technology@harbourinv.com)

Employee Name	Title	Specialty	Direct Line	Email Address
Aaron Hager	President	Strategic Planning & Recruiting	(608) 664-3721	ahager@harbourinv.com
Angie Hellenbrand	Transition & Advisory Specialist	Advisory Operations & Commissions	(608) 664-3712	ahellenbrand@harbourinv.com
Ava Davisson	Operations Assistant / Training	Atlas Support & Training, Operations	(608) 664-3710	adavisson@harbourinv.com
Bailey Buhr	Principal in Training	Advisory Services	(608) 664-3730	bbuhr@harbourinv.com
Brittany Cink	Operations Assistant	Operations, Receptionist	(608) 664-3703	bcink@harbourinv.com
Charity Reich	Receptionist	Receptionist, Operations	(608) 664-3700	creich@harbourinv.com
Daniel Wipperfurth	VP of Advisor Development	Advisory Services & Product Information	(608) 664-3704	dwipperfurth@harbourinv.com
Jennica Valdez	Operations Assistant	Pershing Operations (PAS & Retail Brokerage)	(608) 664-3717	jvaldez@harbourinv.com
Jenna Klimek	Commission Specialist	Commissions	(608) 664-3725	jklimek@harbourinv.com
Jeremy Brown	Fixed Insurance Manager	Fixed Insurance & Compliance Advertising Approvals	(608) 664-3715	jbrown@harbourinv.com
Jim Dushek	VP of Operations	Financial & Data Operations	(608) 664-3711	jdushek@harbourinv.com
Julie Nelles	VP Advisory Operations & Services	Advisory Services	(608) 664-3713	jnelles@harbourinv.com
Kyle Kopitzke	Transaction Compliance Principal	Product Information & New Business Relations	(608) 664-3701	kkopitzke@harbourinv.com
Megan Smith	Office Manager / Recruiting Assistant	Transition Services & Licensing	(608) 664-3706	msmith@harbourinv.com
Melissa Johnson	Licensing Coordinator	Licensing Specialist	(608) 664-3723	mjohnson@harbourinv.com
Mike Dell'Olio	Information Systems Specialist	Software Support & Training	(608) 664-3726	mdellolio@harbourinv.com
Nick Sondel	CEO & Chairman	Corporate Strategy	(608) 664-3724	nsondel@harbourinv.com
Nikki Dahm	Event Coordinator	Operations & Event Coordinator	(608) 664-3720	ndahm@harbourinv.com
Rhonda Meyer	Sr VP & Chief Operating Officer	Operations & Recruiting	(608) 664-3707	rmeyer@harbourinv.com
Rich O'Leary	Director of Compliance Surveillance	Transaction Surveillance	(608) 664-3708	roleary@harbourinv.com
Rick Medland	Director of Brokerage Supervision	New Business Approval & Product Information	(608) 664-3705	rmedland@harbourinv.com
Robbie Wuertich	Operations Assistant	Operations & Software Support (Morningstar)	(608) 664-3702	rwuertich@harbourinv.com
Scott Conwell	RIA Compliance Officer	Compliance & RIA Supervision	(608) 664-3729	sconwell@harbourinv.com
Tony Smith	Transaction Compliance Principal	Pershing Brokerage & AML Specialist	(608) 664-3716	tsmith@harbourinv.com