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WEALTH MANAGEMENT
Charting Your Course For Retirement

www.ryanwealth.com

MEET THE TEAM

ROBERT C. RYAN III
Financial Advisor/Principal

Robert Ryan is the principal owner and a Financial Consultant within the firm. A perceptive and experienced advisor, Rob understands clients' concerns and skillfully breaks down complicated financial matters into easily understood terms. Rob is a great resource to me, as well as you, for all things related to financial health and success.

JUSTIN T. BURROW
Chief Operating Officer
& Partner

Justin Burrow is our Chief Operating Officer, a Financial Consultant, and Partner of the firm. He performs comprehensive analysis on investment portfolios, Social Security strategies, and financial planning. When he's not meeting with clients, he's focused on running the company, managing personnel, and evaluating new ways to enhance our investment analysis.

KEVIN C. SPAFFORD
Wealth Manager, CFP®
& Partner

Kevin Spafford is a CERTIFIED FINANCIAL PLANNER™, Wealth Manager, and Partner of the firm. He has an incredible depth and breadth of planning experience that we utilize and glean from. We count on him for complex matters relating to financial planning, estate tax planning, and succession planning for family business owners.

LARRY R. FRANK, SR.
Consultant to RWM
MBA, CFP®

A CERTIFIED FINANCIAL PLANNER® with 30 years experience, Larry specialized in retirement income research combining portfolio and longevity statistics for computations where your money outlives you; or it's unlikely you outlive your money. Larry has peer reviewed research papers published in various academic journals and is the author of "*Wealth Odyssey*."

Brenda Upton
Office Manager, CFP®

Brenda Upton, our Yuba City Office Manager, is a tremendous help to me and can be an equally tremendous help to you. Brenda is a CERTIFIED FINANCIAL PLANNER™ and retirement plan specialist. She understands clients' needs and offers valuable information as we go through the planning process. Brenda always welcomes any questions you may have.

Tina Morris
Registered Assistant

Tina Morris is a Registered Assistant and the Office Manager of our Spokane office. She works diligently to help us maintain all the details necessary to keep your investment planning process running smoothly and efficiently. Tina is excellent at helping us anticipate, understand, and address the needs of our clients in Washington.

Hayley Culp
Administrative Assistant

Hayley Culp is an Administrative Assistant. Again, my goal is to provide you with the best possible service. Hayley helps me to do this by staying in touch with you through letters and birthday greetings. I'm sure you will find her to be pleasant and eager to help.

Mariela Contreras
Administrative Assistant

Mariela Contreras is an Administrative Assistant and our Client Engagement Coordinator Lead. Alongside her warm greeting when you call in, Mariela works hard to make sure clients are connected to the people and resources they need within our office.

Client Centered

Whether you are investing to build wealth, protect your family, or preserve your assets, our personalized service focuses your needs, wants, and long-term goals.

We follow the highest fiduciary and industry standards, principles and practices, so you can relax, knowing we are committed to your success. You can depend on excellent customer service from our well-established team of advisors and staff.

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