

EXECUTIVE TEAM		
George Gay	georgegay@firstaffirmative.com	719.636.1045 x111 / 800.422.7284 x111
Steve Schueth	steveschueth@firstaffirmative.com	303.442.8400 x101 / 877.540.4933 x101
Kathy Lewis	kathy@firstaffirmative.com	719.636.1045 x119 / 800.422.7284 x119
Kevin O'Keefe	kevinok@firstaffirmative.com	303.668.2296 / 877.402.4333
INVESTMENT COMMITTEE		
Investment Committee	invcom@firstaffirmative.com	
George Gay	georgegay@firstaffirmative.com	719.636.1045 x111 / 800.422.7284 x111
Kevin O'Keefe	kevinok@firstaffirmative.com	303.668.2296 / 877.402.4333
Mel Miller	mmiller@firstaffirmative.com	563.590.7105
INVESTMENT SERVICES TEAM		
GeneSIS online IPS generator	https://secure.omnimaxsoftware.com/Default.aspx?tabid=198063&ctl=Login	Fax: 720.221.0500
Joey Finkbeiner	joey@firstaffirmative.com	719.636.1045x 121 / 800.422.7284 x121
Greg Thornton	greg@firstaffirmative.com	719.636.1045 x118 / 800.422.7284 x118
Tito Bercedoni	tito@firstaffirmative.com	719.636.1045 x113 / 800.422.7284 x113
COMPLIANCE		
Compliance	compliance@firstaffirmative.com	
Correspondence	correspondence@firstaffirmative.com	
Kathy Lewis	kathy@firstaffirmative.com	719.636.1045 x119 / 800.422.7284 x119
ACCOUNT SERVICES TEAM		
Service at First Affirmative	service@firstaffirmative.com	
Julie McNamara	juliemcnamara@firstaffirmative.com	719.636.1045 x117 / 800.422.7284 x117
Caryn Mitchell	caryn@firstaffirmative.com	719.636.1045 x115 / 800.422.7284 x115
Katrina Tobert	katrina@firstaffirmative.com	719.636.1045 x112 / 800.422.7284 x112
Tim Giedd	timgiedd@firstaffirmative.com	919.205.1146
Debbie Wilder	debbiewilder@firstaffirmative.com	719.636.1045 x114 / 800.422.7284 x114
Stephen Gonzales, Jr.	stephengonzales@firstaffirmative.com	719.636.1045 x116 / 800.422.7284 x116
BUSINESS DEVELOPMENT TEAM		
Business Development	businessdevelopment@firstaffirmative.com	
Steve Schueth	steveschueth@firstaffirmative.com	303.442.8400 x101 / 877.540.4933 x101
Danielle Burns	danielleburns@firstaffirmative.com	720.733.8590 / 877.542.8583
Mike Sakraida	mike.s@fanresources.com	914.862.0032 office / 914.539.1462 cell
Laura Isanuk	lauraisanuk@firstaffirmative.com	303.442.8400 x104 / 877.540.4933 x104
James Griffiths	james@firstaffirmative.com	303.442.8400 x100 / 877.540.4933 x100
ADMINISTRATIVE SERVICES TEAM		
Gail Welle	gailwelle@firstaffirmative.com	719.233.3326
Diane Conrad	dianeconrad@firstaffirmative.com	719.636.1045 x110 / 800-422-7284 x110
ADVOCACY AND ENGAGEMENT		
Holly Testa	hollytesta@firstaffirmative.com	303.641.5190
THE SRI CONFERENCE		
Krystala Kalil	Krystala@SRIconference.com	888.774.2663 (888.SRI.CONF)
STRATEGIC CONSULTANTS		
Rebecca Jackson	rebeccaemmiejackson@gmail.com	303.442.8400 x103 / 877.540.4933 x103
Elissa Washburn	washburn5858@gmail.com	719-648-7047

Key Support Organizations

HOME OFFICE: First Affirmative Financial Network

5475 Mark Dabling Boulevard, Suite 108, Colorado Springs, Colorado 80918

www.firstaffirmative.com

Main Phone: 719.636.1045 / 800.422.7284

Main Fax: 719.636.1943

Fax for Service at First Affirmative: 720.836.6401

BOULDER OFFICE: First Affirmative Financial Network

2503 Walnut Street, Suite 201, Boulder, Colorado 80302

www.firstaffirmative.com

Boulder Phone: 303.442.8400 / 877.540.4933

Fax for Marketing / Business Development: 720.221.0470

SCHWAB INSTITUTIONAL | IST Denver 1

Regular Mail: Charles Schwab & Co. Inc. PO Box 982603, El Paso, Texas 79998

Delivery Service: 1945 Northwestern Drive, El Paso, Texas 79912

Phone: 877.460.4476 | Fax: 877.471.8478 | www.SchwabInstitutional.com

FOLIO INSTITUTIONAL

8180 Greensboro Drive, 8th Floor, McLean Virginia 22102

Phone: 888.485.3456 | Fax: 703.649.6288 | support@folioinstitutional.com | www.folioadvisor.com

IMPORTANT! Service Requests...

Please submit all service requests to service@firstaffirmative.com. This includes all Account Services, Billing, Compliance, Trading, IPS review, and Reporting requests. Service will then route your request to the appropriate First Affirmative team member.

How to Contact Team Members Directly (listed alphabetically by LAST NAME)

Tito Bercedoni	Investment Specialist	tito@firstaffirmative.com	719.636.1045 x113 / 800.422.7284 x113
Danielle Burns	Vice President, Sales and Marketing	danielleburns@firstaffirmative.com	720.733.8590 / 877.542.8583
Diane Conrad	Receptionist	dianeconrad@firstaffirmative.com	719.636.1045 x110 / 800.422.7284 x110
Joey Finkbeiner	Manager, Managed Account Solutions	joey@firstaffirmative.com	719.636.1045 x109 / 800.422.7284 x109
George Gay	Chief Executive Officer	georgegay@firstaffirmative.com	719.636.1045 x111 / 800.422.7284 x111
Tim Giedd	Salesforce Administrator	timgiedd@firstaffirmative.com	919.205.1146
Stephen Gonzales, Jr.	Account Services Specialist	stephengonzales@firstaffirmative.com	719.636.1045 x116 / 800.422.7284 x116
James Griffiths	Marketing Assistant	james@firstaffirmative.com	303.442.8400 x100 / 877.540.4933 x100
Laura Isanuk	Marketing Manager	lauraisanuk@firstaffirmative.com	303.442.8400 x104 / 877.540.4933 x104
Kathy Lewis	Chief Compliance Officer	kathy@firstaffirmative.com	719.636.1045 x119 / 800.422.7284 x119
Rebecca Jackson	Strategic Consultant	rebeccaemiejackson@gmail.com	303.442.8400 x103 / 877.540.4933 x103
Krystala Kalil	SRI Conference Coordinator	Krystala@SRIconference.com	888.774.2663 (888.SRI.CONF)
Julie McNamara	Senior Vice President, Account Services	juliemcnamara@firstaffirmative.com	719.636.1045 x117 / 800.422.7284 x117
Mel Miller	Chief Economist	mmiller@firstaffirmative.com	563.590.7105
Caryn Mitchell	Account Services Specialist	caryn@firstaffirmative.com	719.636.1045 x115 / 800.422.7284 x115
Kevin O'Keefe	Chief Investment Officer	kevinok@firstaffirmative.com	303.798.0632 / 877.402.4333
Mike Sakraida	Business Development Consultant	mike.s@fanresources.com	914.862.0032 office / 914.539.1462 cell
Steve Schueth	President	steveschueth@firstaffirmative.com	303.442.8400 x101 / 877.540.4933 x101
Holly Testa	Director, Shareowner Engagement	hollytesta@firstaffirmative.com	303.641.5190
Katrina Tobert	Account Services Specialist	katrina@firstaffirmative.com	719.636.1045 x112 / 800.422.7284 x112
Greg Thornton	Manager, Managed Account Solutions	greg@firstaffirmative.com	719.636.1045x 118 / 800.422.7284 x118
Elissa Washburn	Strategic Consultant	washburn5858@gmai.com	719-648-7047
Gail Welle	Accounting Specialist	gailwelle@firstaffirmative.com	719.233.3326
Debbie Wilder	Account Services Specialist	debbiewilder@firstaffirmative.com	719.636.1045 x114 / 800.422.7284 x114

How to Contact Team Members Directly (listed alphabetically by FIRST NAME)

Caryn Mitchell	Account Services Specialist	caryn@firstaffirmative.com	719.636.1045 x115 / 800.422.7284 x115
Danielle Burns	Vice President, Sales and Marketing	danielleburns@firstaffirmative.com	720.733.8590 / 877.542.8583
Debbie Wilder	Account Services Specialist	debbiewilder@firstaffirmative.com	719.636.1045 x114 / 800.422.7284 x114
Diane Conrad	Receptionist	dianeconrad@firstaffirmative.com	719.636.1045 x110 / 800.422.7284 x110
Elissa Washburn	Strategic Consultant	washburn5858@gmai.com	719-648-7047
Gail Welle	Accounting Specialist	gailwelle@firstaffirmative.com	719.233.3326
George Gay	Chief Executive Officer	georgegay@firstaffirmative.com	719.636.1045 x111 / 800.422.7284 x111
Greg Thornton	Manager, Managed Account Solutions	greg@firstaffirmative.com	719.636.1045 x118 / 800.422.7284 x118
Holly Testa	Director, Shareowner Engagement	hollytesta@firstaffirmative.com	303.641.5190
James Griffiths	Marketing Assistant	james@firstaffirmative.com	303.442.8400 x100 / 877.540.4933 x100
Joey Finkbeiner	Manager, Managed Account Services	joey@firstaffirmative.com	719.636.1045 x109 / 800.422.7284 x109
Julie McNamara	Senior Vice President, Account Services	juliemcnamara@firstaffirmative.com	719.636.1045 x117 / 800.422.7284 x117
Kathy Lewis	Chief Compliance Officer	kathy@firstaffirmative.com	719.636.1045 x119 / 800.422.7284 x119
Katrina Tobert	Account Services Specialist	katrina@firstaffirmative.com	719.636.1045 x112 / 800.422.7284 x112
Kevin O'Keefe	Chief Investment Officer	kevinok@firstaffirmative.com	303.798.0632 / 877.402.4333
Krystala Kalil	SRI Conference Coordinator	Krystala@SRIconference.com	888.774.2663 (888.SRI.CONF)
Laura Isanuk	Marketing Manager	lauraisanuk@firstaffirmative.com	303.442.8400 x104 / 877.540.4933 x104
Mel Miller	Chief Economist	mmiller@firstaffirmative.com	563.590.7105
Mike Sakraida	Business Development Consultant	mike.s@fanresources.com	914.862.0032 office / 914.539.1462 cell
Rebecca Jackson	Strategic Consultant	rebeccaemiejackson@gmail.com	303.442.8400 x103 / 877.540.4933 x103
Stephen Gonzales, Jr.	Account Services Specialist	stephengonzales@firstaffirmative.com	719.636.1045 x116 / 800.422.7284 x116
Steve Schueth	President	steveschueth@firstaffirmative.com	303.442.8400 x101 / 877.540.4933 x101
Tim Giedd	Salesforce Administrator	timgiedd@firstaffirmative.com	919.205.1146
Tito Bercedoni	Investment Specialist	tito@firstaffirmative.com	719.636.1045 x113 / 800.422.7284 x113