

Staff Contact Information



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	303.798.0632 / 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	303.798.0632 / 877.402.4333
Johann Klaassen	johann@firstaffirmative.com	719.636.1045 x118 / 800.422.7284 x118
INVESTMENT SERVICES TEAM		
GeneSIS online IPS generator	https://secure.omnimaxsoftware.com/Default.aspx?tabid=198063&ctl=Login	Fax: 720.221.0500
Johann Klaassen	johann@firstaffirmative.com	719.636.1045 x118 / 800.422.7284 x118
David Burton	davidburton@firstaffirmative.com	303.442.8400 x103 / 877.540.4933 x103
COMPLIANCE		
Compliance	compliance@firstaffirmative.com	Fax: 209.231.5121
Correspondence	correspondence@firstaffirmative.com	Fax: 209.370.8638
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	tingiedd@firstaffirmative.com	719.636.1045 x114 / 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
Justin Bilancieri	justin@firstaffirmative.com	303.442.8400 x102 / 877.540.4933 x102
Sara Laks	saralaks@firstaffirmative.com	303.442.8400 x104 / 877.540.4933 x104
ADMINISTRATIVE SERVICES TEAM		
Debbie Gaffney	debbiegaffney@firstaffirmative.com	303.579.5577
Gail Welle	gailwelle@firstaffirmative.com	719.636.1045 x 110 / 800.422.7284 x110
Kimberly Sullivan	kimberly@firstaffirmative.com	719.636.1045 x 113 / 800.422.7284 x113
ADVOCACY TEAM		

Holly Testa	hollytesta@firstaffirmative.com	303.641.5190
Steve Schueth	steveschueth@firstaffirmative.com	303.442.8400 x101 / 877.540.4933 x101

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 | Compliance Fax: 209.231.5121

Fax for Service at First Affirmative: 720.221.0500 | Fax for Proposals / IPS': 720.221.0500

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 | Team 6

2423 E Lincoln Drive, Phoenix, Arizona 85016

Phone: 866.738.9111 | Fax: 877.255.1983 | www.SchwabInstitutional.com

FOLIO INSTITUTIONAL

8180 Greensboro Drive, 8th Floor, McLean Virginia 22102

Phone: 888.485.3456 | Fax: 703.880.7313 | 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)

Justin Bilancieri	Marketing / Graphic Design Specialist	justin@firstaffirmative.com	303.442.8400 x102 / 877.540.4933 x102
Danielle Burns	Manager, Advisor Relations	danielleburns@firstaffirmative.com	720.733.8590 / 877.542.8583
David Burton	Investment Services Specialist	davidburton@firstaffirmative.com	303.442.8400 x103 / 877.540.4933 x103
Debbie Gaffney	Controller	debbiegaffney@firstaffirmative.com	303.579.5577
George Gay	Chief Executive Officer	georgegay@firstaffirmative.com	719.636.1045 x111 / 800.422.7284 x111
Tim Giedd	Account Services Specialist	timgiedd@firstaffirmative.com	719.636.1045 x114 / 800.422.7284 x116
Johann Klaassen	Vice President, Investment Services	johann@firstaffirmative.com	719.636.1045 x118 / 800.422.7284 x118
Sara Laks	Marketing / Communications Associate	saralaks@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
Julie McNamara	Vice President, Account Services	juliemcnamara@firstaffirmative.com	719.636.1045 x117 / 800.422.7284 x117
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
Steve Schueth	President	steveschueth@firstaffirmative.com	303.442.8400 x101 / 877.540.4933 x101
Kimberly Sullivan	Management Information Specialist	kimberly@firstaffirmative.com	719.636.1045 x113 / 800.422.7284 x113
Holly Testa	Shareholder Advocate, Business Development Consultant	hollytesta@firstaffirmative.com	303.641.5190
Katrina Tobert	Account Services Specialist	katrina@firstaffirmative.com	719.636.1045 x112 / 800.422.7284 x112
Gail Welle	Administrative Assistant, Bookkeeper	gailwelle@firstaffirmative.com	719.636.1045 x 110 / 800.422.7284 x110

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	Manager, Advisor Relations	danielleburns@firstaffirmative.com	720.733.8590 / 877.542.8583
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