
MARINER

CONTACT LIST:

State College office



Leadership

Rob Thomas

Managing Director

rob.thomas@mariner.com

Welcome to our team directory. Below is an overview of each department, along with key contacts and email addresses for reaching the right team member. Note that department-level email addresses will go to the appropriate team in Freshdesk, whereas personal email addresses will go directly to each team member.

Operations department

CPGOperations@mariner.com

Ensures day-to-day operational functions run smoothly, focusing on serving clients and advisors, account maintenance, cashiering, internal systems and reporting.

Client services

Supports clients and advisors with account-related inquiries and ongoing service needs.

Sherry Confer – Client Service Manager

sherry.confer@mariner.com

Ginger Espigh – Client Service Manager

ginger.espigh@mariner.com

Account administration

Handles account and client portal setup, report/statement requests, and account updates, including change of address, beneficiary updates, name changes, etc.

Aletta Lenker – Sr. Client Service Associate

aletta.lenker@mariner.com

Andrew Ball – Client Service Associate

andrew.ball@mariner.com

Samantha Beaudoin – Client Service Associate

samantha.beaudoin@mariner.com

Lisa Desmarais – Client Service Associate

lisa.desmarais@mariner.com

Cashiering

CPGCashiering@mariner.com

Processes distributions and contributions for clients; calculates and processes annual RMD's; establishes links between brokerage and bank accounts and monitors money movement.

Kelly Markel – Sr. Client Service Associate

kelly.markel@mariner.com

Erin Coates – Client Service Associate

erin.coates@mariner.com

Krysta Whitebread – Client Service Associate

krysta.whitebread@mariner.com

Reception and administrative coordinator

Serves as the first point of contact for callers and visitors, responsible for creating a welcoming and professional experience.

Marco Smouse – Client Service Associate

marco.smouse@mariner.com

New business department

CPGPaperwork@mariner.com

Oversees the onboarding of new clients, producing custodial and Mariner paperwork for account setup and transfers, as well as monitoring new account status and researching any issues related to new accounts.

Grace Karaki – Manager, Advisor Services

grace.karaki@mariner.com

Theresa Corle – Sr. Client Service Associate

theresa.corle@mariner.com

Kristina Houp – Sr. Client Service Associate

kristina.houp@mariner.com

Jesi Brooks – Sr. Associate, Advisor Services

jesi.brooks@mariner.com

Miyoko McBee – Sr. Associate, Advisor Services

miyoko.mcbee@mariner.com

Tricia Vasquez – Sr. Associate, Advisor Services

tricia.vasquez@mariner.com

Carol Morelock – Client Service Associate

carol.morelock@mariner.com

Paperwork Support Team:

Victoria Scott – Sr. Client Service Associate

victoria.scott@mariner.com

Investments department

CPGProposals@mariner.com

Supports investment strategy, portfolio management tools, market research and proposal generation. Assists advisors in closing new business and account performance reviews.

Ron Beyer – Director, Investment Strategy

ron.beyer@mariner.com

Casey Hauser – Vice President, Investment Strategy

casey.hauser@mariner.com

Jill Sutt – Vice President, Investment Strategy

jill.sutt@mariner.com

Alyssa Peterson – Senior Investment Analyst

alyssa.peterson@mariner.com

Andi Motter – Investment Analyst

andi.motter@mariner.com

Joshua Lee – Investment Analyst

joshua.lee@mariner.com

Trading department

CPGTrading@mariner.com

Executes trades across various platforms and provides market access for advisors and clients. Rebalances portfolios to maintain target asset allocations.

Becky Haney – Manager of Trading

becky.haney@mariner.com

Taylor Rider – Sr. Trading Associate

taylor.rider@mariner.com

Trading Support Team:

Greg Fierros – Associate, Trading

greg.fierros@mariner.com

Business development and advisor relations

Builds and maintains strong advisor partnerships to support firm growth, nurture existing relationships and support the onboarding process for advisors and clients.

Rob Thomas – Managing Director (National)
rob.thomas@mariner.com

Bret Hoag – Director, Business Development
& Advisor Relations (East Coast)
bret.hoag@mariner.com

Maury Wiles – Director, Business Development
& Advisor Relations (West Coast)
maury.wiles@mariner.com

New advisor onboarding

Introduces new advisors and their staff to Mariner's features and processes and provides ongoing advisor support during their transition to Mariner.

Andrew Ball – Client Service Associate
andrew.ball@mariner.com

GENERAL QUESTIONS

If you have questions or are uncertain of who to reach out to for your specific request, please email our general support team at support@partnerwithmariner.com or call the office at **888-797-6161**. Our office is located, and mail can be received at the following address*:

Mariner
1375 Martin Street
Suite 200
State College, PA 16803

** Note that client checks mailed to our office should be made payable to the custodian, not to Mariner.*

Thank you for choosing Mariner as your trusted partner!

For more information visit: partnerwithmariner.com

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