# Optive ADVISORY SERVICES

## OAS Team and Resource Contact Information

| Support Areas | Department | Team Member | **Direct Number | Ext. | MyRepChat Number | *Email |
|---|---|---|---|---|---|---|
| - Managing Partner<br>- Chief Compliance Officer | Co-Founder, Managing Partner | **Michael Wallin, CFP®** | (615) 850-6710 | 100 | (615) 551-9400 | mwallin@optiviseria.com |
| Chief Financial Officer | Co-Founder, Partner<br>HR; Advanced Planning<br>(Tax, Accounting, and Biblically Responsible) | **Allen Hargis, CPA,RICP®** | (501) 441-5100 | 106 | | ahargis@optiviseria.com |
| Chief Investment Officer | Partner | **Cory Colquette,CPA,PFS®** | (615) 469-0349 | 104 | 423-702-4052 | ccolquette@optiviseria.com |
| - Adviser Relations<br>(1st Point of Contact)<br>- Adviser Development<br>- Non-investment Operations | Adviser Relations & Development | **Scott Magoon, CFS®** | (615) 850-7997 | 101 | | smagoon@optivisehq.com |
| - Case Preparation for Advisers<br>- Investment Data Management | Advanced Case Design | **Kyle Davis, MBA** | (615) 850-8448 | 103 | | kdavis@optivisehq.com |
| - Chief Operations Officer<br>- Sr. Compliance Officer | Operations/ Compliance | **Jason Moore, CFP®, ChFC®, CLU®** | (615) 465-8380 | 102 | | jmoore@optivisehq.com |
| - Technology Onboarding<br>- Process & Procedures Training<br>- Client Account Servicing | Operations | **Cherre Oakley** | (615) 560-6667 | 105 | | coakley@optivisehq.com |
| **Fusion Capital<br>New Business Submission** | Mailing Address:<br>9111 Cypress Waters Blvd. Suite 140 Dallas, Texas 75019 | **Johnathan Yoo** | (866) 254-4235 | | | jonathan.yoo@fusioncm.com |

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***Emails with OptiviseRIA.com denotes the team member is also an active Investment Advisor Representative.**
**Team members with an OptiviseHQ.com email domains are not active Investment Advisor Representatives.**

**PLEASE MAKE SURE YOU TAKE NOTE OF THESE DIFFERENCES WHEN YOU EMAIL A TEAM MEMBER.**

**** Direct Lines for internal team members also receive text messages and faxes.**