



## Meet the Faberman/Filosa Team



### Matt Bonsall

Director of Investment, Planning Operations

781-373-4439 | [Matthew.Bonsall@IFPAdvisor.com](mailto:Matthew.Bonsall@IFPAdvisor.com)

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- Investment and planning related inquiries
  - Product specific questions



### Carla Leombruno

Director of Client Experience and Trading Operations

781-373-4418 | [Carla.Leombruno@IFPAdvisor.com](mailto:Carla.Leombruno@IFPAdvisor.com)

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- Urgent requests
  - Requesting money
  - Not sure who to call? Start with me.
  - Updating bank account



### Austin Sloane

Client Relationship Manager

781-373-4417 | [Austin.Sloane@IFPAdvisor.com](mailto:Austin.Sloane@IFPAdvisor.com)

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- New account setup
  - Account transfers
  - Retitling accounts
  - Life insurance
  - Problem resolution
  - Change of beneficiary



### Denise Nou

Director of Client Reporting & Advisor Support

781-547-6933 | [Denise.Nou@IFPAdvisor.com](mailto:Denise.Nou@IFPAdvisor.com)

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- Retrieving 1099's and/or statements
  - Password resets, accessing accounts online or going paperless
  - Change of address
  - Schedule a meeting or call

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