

## Meet the Faberman/Filosa Team



### **Matt Bonsall**

Director of Investment, Planning Operations | 781-373-4439 | Matthew.Bonsall@IFPAdvisor.com

- Investment and planning related inquiries
- Product specific questions



### **Carla Leombruno**

Director of Client Experience and Trading Operations | 781-373-4418 | Carla.Leombruno@IFPAdvisor.com

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



### **Kristan Bjorkman**

Director of Business Processing | 781-373-4417 | Kristan.Bjorkman@IFPAdvisor.com

- New account setup
- Retitling accounts
- Account transfers
- Life insurance



### **Denise Nou**

Director of Administrative Operations | 781-547-6933 | Denise.Nou@IFPAdvisor.com

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



### **John Piantedosi**

Chief Operating Officer of Faberman-Filosa Group | 781-373-4419 | John.Piantedosi@IFPAdvisor.com

- Supervises client service activities
- Oversees the day-to-day operations
- Executes the firms strategic planning initiatives
- Manages the firm's technology integrations