

# Team Roles and Areas of Focus

*growing money. solving problems.*

**Investment Group** The Investment Group (also known as BSWig) develops the firm's economic outlook, investment strategy, and stable of managers that are then translated into investment portfolios allocated according to individual goals and sensibilities.


**Advisory Group** The Advisory Group handles the qualitative aspects of client relationships, identifying goals and concerns, assembling the necessary team of professionals to achieve the appropriate solution, and walking the delicate path through emotional issues surrounding wealth.

**Craig Seidler**  
Portfolio Manager



- Portfolio Review & Implementation
- Alternative Investments
- Fixed Income

**Debi Baydush | Partner**  
Business Strategy



- Client Outreach & Education
- Business Strategy

**Ben Weaver | Partner**  
Advisor  
CFP®



- Full range of advisory services as detailed above

**Ralieg Riddoch**  
Advisor  
CFP®



- Full range of advisory services as detailed above

**Elias Bachmann**  
Portfolio Manager  
CFA®



- Portfolio Review & Implementation
- Direct Real Estate
- Private Equity

**David Wolf | Partner**  
CIO/COO




- BSW Investment Strategy
- Impact Portfolio Offering
- Business Operations

**Drew Simon | Partner**  
Advisor



- Full range of advisory services as detailed above

**Tim Wojtalik**  
Advisor  
CFP®



- Full range of advisory services as detailed above

**Matt Samek**  
Associate Portfolio Manager



- Equity Trading
- Research/Analysis
- Financial Software Management

**Tina Ottersberg**  
Planning Associate  
CFP®



- Full range of advisory services as detailed above

**Operations Group** The Operations Group provides behind-the-scenes support that keeps the business going. This includes coordination of all paperwork necessary for client accounts and investments, money movement, specialized reporting and billing as well as being able to handle general questions and service issues.

**Trisha Soares**  
Financial Analyst



- Reporting
- Advisory Support

**Ashley Humphreys**  
Client Service Manager



- Cashiering
- Specialized Tax Reporting (K-1s)
- Alternative Investment Coordination

**Sarah Goodroad**  
Office Manager/  
Reception



- Office Management
- Scheduling
- Account Servicing
- Notary

**Alex Martella**  
Partner Support



- Scheduling
- Project Work
- Special Events