



**LEVEL FOUR®**  
Financial  
A DIVISION OF  
CARR, RIGGS & INGRAM CAPITAL, LLC



**LEVEL FOUR®**  
Advisory Services  
A DIVISION OF  
CARR, RIGGS & INGRAM CAPITAL, LLC

**DALLAS**  
12400 Coit Road  
Suite 700  
Dallas, TX 75251  
866.834.1040

**MOBILE**  
11 N Water Street  
Suite 21290  
Mobile, AL 36602  
888.397.7358

**LEADERSHIP**

Edmon "Jake" Tomes	Chief Executive Officer & Private Client Wealth Advisor	866.834.1040	jtomes@levelfourfinancial.com
Marc Whitehead	Chief Financial Officer (LFG) & President (LFF)	888.397.3758	mwhitehead@levelfourfinancial.com
G. Brent Morton, MBA, AIFA®	Chief Operating Officer & Private Client Wealth Advisor	866.834.1040	bmorton@levelfourfinancial.com
Jill Zacha, JD	Chief Compliance Officer, Advisory & Corporate Counsel	972.284.5475	jzacha@levelfourfinancial.com
Brian Gongwer	Chief Relationship Officer	866.834.1040	bgongwer@levelfourfinancial.com

**COMPLIANCE**

Stacey Lavender	Chief Compliance Officer, Broker/Dealer	251.445.2434	slavender@levelfourfinancial.com
Kimberly Miller	Compliance Director, Risk and Regulatory	972.284.5478	kmiller@levelfourfinancial.com
Gregg Overstake	Director of Supervision	972.284.5459	goverstake@levelfourfinancial.com
Al Tadeo	Branch Manager, Supervisory Principal	972.284.5472	altadeo@levelfourfinancial.com
Chrystal Badillo	Branch Manager, Supervisory Principal	972.284.5408	cbadillo@levelfourfinancial.com
Ernest Tannis	Branch Manager, Supervisory Principal	251.445.4784	etannis@levelfourfinancial.com
Molly Flynn	Compliance Associate	251.445.4787	mflynn@levelfourfinancial.com

**HUMAN RESOURCES**

Ronnie Chambers, SPHR, SHRM-SCP	Human Resources Director	972.284.5497	rchambers@levelfourfinancial.com
Carmen Perez	Human Resources Associate	972.284.5423	cperez@levelfourfinancial.com

**ADVISOR OPERATIONS, CLIENT SERVICES & TRANSITIONS**

Claudia Martin	Managing Director of Advisor Operations	972.284.5450	cmartin@levelfourfinancial.com
Cyril Mathew	Executive Assistant & Private Client Wealth Associate	972.284.5418	cmathew@levelfourfinancial.com
Jo-Ann Palmere	Client Services Associate II & Onboarding Associate	972.284.5447	jpalmere@levelfourfinancial.com
Sally Echterhoff	Client Services Associate	972.284.5456	sechterhoff@levelfourfinancial.com
Lisa Monello	Client Services Associate	972.284.5415	lmonello@levelfourfinancial.com
Vannessa Marley	Client Services Associate	972.284.5442	vmarley@levelfourfinancial.com
Steven Miller	Transitions Support Associate	972.284.5441	smiller@levelfourfinancial.com
Jena Blue	Transitions Support Associate	972.284.5429	jblue@levelfourfinancial.com
Heather Leggett	Practice Support Specialist - Retirement Plans	972.284.5493	hleggett@levelfourfinancial.com
Kevin Welch	Fiduciary Support Specialist - Retirement Plans	972.284.5482	kwelch@levelfourfinancial.com
Nancy Ybarra	Special Projects Coordinator	972.284.5490	nybarra@levelfourfinancial.com
Evan Barnard	Advisor Advocate Manager	972.284.5467	ebarnard@levelfourfinancial.com
Rick Erickson	Operations Integration & Support Director	972.284.5430	rerickson@levelfourfinancial.com
Justin Jones	Operations Manager	972.284.5453	jjones@levelfourfinancial.com
Clorissa Nash	Operations Lead - Billing Team	972.284.5471	cnash@levelfourfinancial.com
Katherine Nichols	Operations Associate - Billing Team	251.445.2431	knichols@levelfourfinancial.com
Krista Norman	Operations Lead - New Accounts Team	972.284.5470	knorman@levelfourfinancial.com
Javier Castro	Operations Associate - New Accounts Team	972.284.5463	jcastro@levelfourfinancial.com
Prince Duwor	Operations Associate - New Accounts Team	972.284.5448	pduwor@levelfourfinancial.com
Erica Dennis	Operations Associate - New Accounts Team	972.284.5427	edennis@levelfourfinancial.com
Rebecca Lasher	Operations Associate - New Accounts Team	251.445.2428	rlasher@levelfourfinancial.com
Sherry Harris	Operations Associate - New Accounts Team	251.445.1612	sharris@levelfourfinancial.com
Bruce Dorman	Operations Associate - LFCM Specialist	972.284.5411	bdorman@levelfourfinancial.com

**HEADQUARTERS OPERATIONS**

Joy Robinson	Executive Assistant	972.284.5452	jrobinson@levelfourfinancial.com
Gayla Jenson	Receptionist	972.284.5401	gjenson@levelfourfinancial.com

**INVESTMENT COMMITTEE (LFCM)**

Todd Bulot	Practice Director - Asset Management	972.284.5488	tbulot@levelfourfinancial.com
Lal Echterhoff, CFA®	Senior Portfolio Manager, Director of Equities	972.284.5462	lechterhoff@levelfourfinancial.com
Ray Shimer, CFA®	Portfolio Manager	919.988.6220	rshimer@levelfourfinancial.com
Michael Xirinachs	Head Trader	972.284.5487	mxirinachs@levelfourfinancial.com
Boris Bouti-Viaudo	Research Analyst	972.284.5454	bboutiviaudo@levelfourfinancial.com
Cameron Neumann	Research Analyst	972.284.5402	cneumann@levelfourfinancial.com

**FINANCE & ACCOUNTING**

Ariane Fricke	Finance Director	972.284.5458	africke@levelfourfinancial.com
Amber Hendricks	Accounting Director	972.284.5496	ahendricks@levelfourfinancial.com
Rhonda Eltiste	Staff Accountant	972.284.5468	retiste@levelfourfinancial.com

**MARKETING**

Justine Huddleston	Marketing Director	972.284.5457	jhuddleston@levelfourfinancial.com
Lauren Martin	Marketing & Design Specialist	972.284.5473	lmartin@levelfourfinancial.com

**PRACTICE DIRECTORS**

Brent White	Practice Director - Property & Casualty	972.284.5449	bwhite@levelfourfinancial.com
David Byrnes, AIF®	Practice Director - Retirement Plans	972.284.5466	dbyrnes@levelfourfinancial.com
Luke Britt, RICP®, CEPA®	Practice Director - Advanced Planning (Insurance) & Business Services	972.284.5481	lbritt@levelfourfinancial.com
Terry Thompkins, CFP®, CLU, AEP®, ADPA®	Practice Director - Financial Planning	972.284.5492	tthompkins@levelfourfinancial.com
Todd Bulot	Practice Director - Asset Management	972.284.5488	tbulot@levelfourfinancial.com
Lacey Buteyn, CRP®, CIMA®	Practice Director - Coaching	972.284.5440	lbuteyn@levelfourfinancial.com
Matt Craig	Practice Director - Private Client Services	972.284.5498	mcraig@levelfourfinancial.com

**MANAGING DIRECTORS & BUSINESS UNIT LEADERS**

Chris Facka, CFP®	Managing Director - Atlanta, GA	770.261.5476	cfacka@levelfourfinancial.com
Frank Martin, CFP®, AIF®	Managing Director - Panama City Beach, FL	850.563.2850	fmartin@levelfourfinancial.com
Steve Wheeler, CPA/PFS, CFP®	Managing Director - Bowling Green, KY	270.783.3562	swheeler@levelfourfinancial.com
Billy Hemby, CFP®	Managing Director - North Carolina	252.649.6111	bhemby@levelfourfinancial.com
Marshall Barclay, CFP®, CRPC®, MBA	Managing Director - El Paso, TX / New Mexico	915.800.4951	mbarclay@levelfourfinancial.com
Larry Crisp, MBA, CLU®, ChFC®, CASL®	Managing Director - Montgomery, AL	334.315.6636	lcrisp@levelfourfinancial.com
Josh Hampton	Business Unit Leader - Dallas, TX	972.284.5495	jhampton@levelfourfinancial.com
Chad Perry	Business Unit Leader - Austin, TX	830.626.5554	cperry@levelfourfinancial.com
Paul Storzinger, CFP®, CIMA®, CLU®	Business Unit Leader - Clearwater, FL	813.545.1244	pstorzinger@levelfourfinancial.com
Jason Doise, LUTCF®	Business Unit Leader - Jackson, MS / Metairie, LA	225.246.2597	jdoise@levelfourfinancial.com
Terry Thompkins, CFP®, CLU, AEP®, ADPA®	Acting Business Unit Leader - Rio Grande Valley	972.284.5492	tthompkins@levelfourfinancial.com
G. Brent Morton, MBA, AIFA®	Acting Business Unit Leader - Stuart	866.834.1040	bmorton@levelfourfinancial.com
Edmon "Jake" Tomes	Acting Business Unit Leader - Houston	866.834.1040	jtomes@levelfourfinancial.com



**DALLAS**  
12400 Coit Road  
Suite 700  
Dallas, TX 75251  
800.460.5567

**FORT WORTH**  
2525 Ridgmar Blvd  
Suite 700  
Fort Worth, TX 76116  
817.731.7373

**LEADERSHIP**

Greg Anderson	Level Four Insurance CMO & Income Partner	972.284.5436	ganderson@levelfourinsurance.com
Harvey Yoder	Level Four Insurance Income Partner	972.284.5469	hyoder@levelfourinsurance.com

**ADVANCED PLANNING**

Luke Britt, RICP <sup>®</sup> , CEPA <sup>®</sup>	Practice Director - Advanced Planning & Business Services	972.284.5481	lbritt@levelfourinsurance.com
Jeremy Britt	Advanced Planning Consultant	972.284.5451	jbritt@levelfourinsurance.com

**PROPERTY & CASUALTY**

Brent White	Practice Director - Property & Casualty	972.284.5449	bwhite@levelfourinsurance.com
Suzanne White	Director of Operations - Property & Casualty	972.284.5460	swhite@levelfourinsurance.com

**RETIREMENT INCOME**

Jeff Wagon	Director of Retirement Income	972.284.5414	jwagon@levelfourinsurance.com
Carey Avants	Retirement Income Consultant	972.284.5413	cavants@levelfourinsurance.com
James Spoons	Retirement Income Consultant	972.284.5445	jspoons@levelfourinsurance.com
Joel Mancha	Retirement Income Consultant	972.284.5494	jmancha@levelfourinsurance.com

**LIFE INSURANCE / DISABILITY INCOME / LONG-TERM CARE**

Randy Ford, CLU <sup>®</sup> , ChFC <sup>®</sup>	Director of Life Insurance	972.284.5405	rford@levelfourinsurance.com
Bryce Yoder	Life Insurance Consultant	972.284.5407	byoder@levelfourinsurance.com
Jeff Jandro	Director of Senior Market - Easy Issue Life and Medicare	972.284.5444	jjandro@levelfourinsurance.com
Jaquita Farrow	Senior Market Consultant - Easy Issue Life and Medicare	972.284.5417	jfarrow@levelfourinsurance.com
Austin Gibbs	Senior Market Consultant - Easy Issue Life and Medicare	972.284.5425	agibbs@levelfourinsurance.com
Emily Grundy	Senior Market Consultant - Easy Issue Life and Medicare	972.284.5479	egrundy@levelfourinsurance.com
Lennox Adundo	Medicare Insurance Specialist	972.284.5431	adundo@levelfourinsurance.com

**COMMISSION ACCOUNTING**

John Stone	Revenue and Commission Administrator	972.284.5476	jstone@levelfourinsurance.com
Dana Kellogg	Revenue and Commission Administrator	972.284.5477	dkellogg@levelfourinsurance.com

**OPERATIONS**

Josh Yoder	Managing Director - Level Four Insurance	817.731.0800	jyoder@levelfourinsurance.com
Debora Foutz, FLMI, ALHC, HIA, ACS	Director of Operations & Senior Underwriting Consultant	972.284.5409	dfoutz@levelfourinsurance.com
Sam Buescher	LFIA Practice Coordinator	972.284.5461	sbuescher@levelfourinsurance.com
Roger New	Manager of Agent Support Services	972.284.5406	rnew@levelfourinsurance.com
Tracy Boysen	New Business Manager	972.284.5424	tboysen@levelfourinsurance.com
Carol Kirkpatrick	Senior Case Manager	817.731.7377	ckirkpatrick@levelfourinsurance.com
Rick Knepper	Senior Case Manager	817.731.7374	rknepper@levelfourinsurance.com
Jan Foster	Case Manager	972.284.5432	jfoster@levelfourinsurance.com
Denise Walker	Case Manager	817.731.7727	dwalker@levelfourinsurance.com
Menay Brown	Annuity Case Manager	866.834.1040	mbrown@levelfourinsurance.com
Teria Pierce	Senior Contracting Specialist	972.284.5401	tpierce@levelfourinsurance.com
Brenda Jandro	Contracting Specialist	972.284.5433	bjandro@levelfourinsurance.com
Mayra Nava	Policy Owner Services Team Lead	817.731.7737	mnava@levelfourinsurance.com
Camden Whiteley	Policy Owner Services Representative	817.731.7737	cwhiteley@levelfourinsurance.com
Mandy Engelson	Systems Administrator	817.731.7386	mengelson@levelfourinsurance.com