

Oak & Stone Team Services Directory



Sales Kits >

Bar Charts & Pyramids • Hypos • Complex Proposals



Al Glessner

Ryan Rickus

Donovan Stuard

Team Contact Email: saleskits@oakandstoneadvisors.com

New Accounts >

Account Preparation • Transfers • Move Money



Lauren Fruchter

Ryannon Holland

Team Contact Email: accounts@oakandstoneadvisors.com

Trading Team >

Model Changes • Free Up Cash • White Glove



Al Glessner

Ryan Rickus

Donovan Stuard

Team Contact Email: trading@oakandstoneadvisors.com

Practice Management >

Redtail • Best Practices • Pareto Systems



Jamie Casper

Donovan Stuard

Team Contact Email: practice@oakandstoneadvisors.com

Marketing Services >

Marketing Strategies • Campaigns • Custom Branding



Alex Lerch

Lauren Fruchter

Team Contact Email: marketing@oakandstoneadvisors.com

Insurance Services >

Life • LTC • Case Design • Complex Solutions • Fixed Annuity



Brian Villec (All Fixed)

Pete Buxton (Annuity)

Jennifer O'Neil (Life)

bvillec@mbgnow.com | *Millennium Brokerage Group*

pbuxton@highland.com | joneil@highland.com | *Highland*

Name	Role	Email Address	Phone Number
Al Glessner	<i>Portfolio Analyst, Trader</i>	al@oakandstoneadvisors.com	410-943-3501 (Office) 410-725-9080 (Cell)
Alex Lerch	<i>Marketing</i>	alex@oakandstoneadvisors.com	215-259-4660 (Office) 610-704-8202 (Cell)
Brian Villec	<i>Fixed Business Consultant</i>	bvillec@mbgnow.com	302-354-2661 (Cell)
Donovan Stuard	<i>Trading & Sales Support</i>	donovan@oakandstoneadvisors.com	855-625-7866 (Office) 610-657-4214 (Cell)
Jamie Casper	<i>Practice Management, Benefits</i>	jamie@oakandstoneadvisors.com	215-259-4660 (Office) 267-221-7943 (Cell)
Jennifer O'Neil	<i>Life & LTC Case Design</i>	joneil@highland.com	860.863.8199
Lauren Fruchter	<i>New Accounts, Marketing</i>	lauren@oakandstoneadvisors.com	855-625-7866 (Office) 267-566-3043 (Cell)
Pete Buxton	<i>Annuity Advisor Consultant</i>	pbuxton@highland.com	571-707-2522 (Office) 703-431-2510 (Cell)
Ryan Rickus	<i>Portfolio Analyst, Trader</i>	ryan@oakandstoneadvisors.com	856-266-8840 (Cell)
Ryannon Holland	<i>New Accounts</i>	ryannon@oakandstoneadvisors.com	215-259-4660 (Office)
Seth Diener	<i>Portfolio Manager</i>	seth@oakandstoneadvisors.com	215-259-4660 (Office) 215-317-9811 (Cell)
Jawaun King	<i>Service Escalation</i>	jawaun.king@lplfinancial.com	