



Byron Nelson CFP®, CWS®, CKA®

Sr. Private Wealth Advisor

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P: 949.404.5076

- » Serves as clients' wealth advisor and stewardship coach
- » Helps guide clients in creating their vision for the future
- » Develops investment strategies aligned to clients' goals, cash flow plans, and risk tolerance
- » Directs team



Mary Mohn

Financial Planning Associate

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P: 949.404.5079

- » Assists in developing and coordinating strategic financial plans
- » Assists in research and implementation of client investment and planning decisions
- » Handles client meeting preparation



Westin Dawe

Financial Planner

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P: 949.404.5087

- » Assists in developing and coordinating strategic financial plans
- » Assists in research and implementation of client investment and planning decisions
- » Handles client meeting preparation



Joanne Paff

Sr. Client Service Associate

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- » Schedules meetings
- » Opens accounts - prepares forms and applications
- » Processes deposits
- » Distributes funds

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Blue Trust advisors apply biblical wisdom and technical expertise to help clients make wise financial decisions to experience clarity and confidence and leave a lasting legacy. 8121067-01-19

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