BlueTrust

Your Service Team

Byron Nelson CFP®

Sr. Private Wealth Advisor, Partner

E: byron.nelson@bluetrust.com

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

Westin Dawe CFP®, CKA®

Financial Planner

E: westin.dawe@bluetrust.com

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

Parker Setran CFP®, CPA

Financial Planner

E: parker.setran@bluetrust.com

P: 949.404.5083

» 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

E: joanne.paff@bluetrust.com

P: 949.404.5075

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