BlueTrust

Your Service Team

Byron Nelson CFP®, CWS®, CKA®

Sr. Private Wealth Advisor
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

Mary Mohn

Financial Planning Associate
E: mary.mohn@bluetrust.com
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
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

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

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