A full team behind every client relationship.

Get to know the people who serve Promontory Financial Planning clients.

LEADERSHIP

Brock Williamson, CFP®
Owner & CEO • Investment Committee Chair

YOUR ADVISORY TEAM

Jon A. Paulsen
Financial Advisor
INVESTMENT COMMITTEE

William E. Sandberg
Financial Advisor
INVESTMENT COMMITTEE

Paul Gelormini
Financial Advisor
INVESTMENT COMMITTEE

David M. Goar
Financial Advisor
INVESTMENT COMMITTEE

RB

Ross M. Bowen
Financial Advisor

Ron R. Valentine & Robyn D. Simons
Financial Advisors

John D. Houck
Financial Advisor

Emily Langeveld
Financial Advisor • Senior Health Planner

The Investment Committee Brock Williamson, CFP® (Chair) • Jon A. Paulsen • William E. Sandberg • Paul Gelormini • David M. Goar

CLIENT SERVICE & OPERATIONS

Kelsey Muir
Chief Compliance Officer
Director of Operations

Tyra Williamson
Owner • Client Relations Manager

CB

Carey Barriball
Director of Operations

Melissa Stuart
Director of Operations

Jacob Goar
Relationship Manager

Theresa Bond
Service Manager

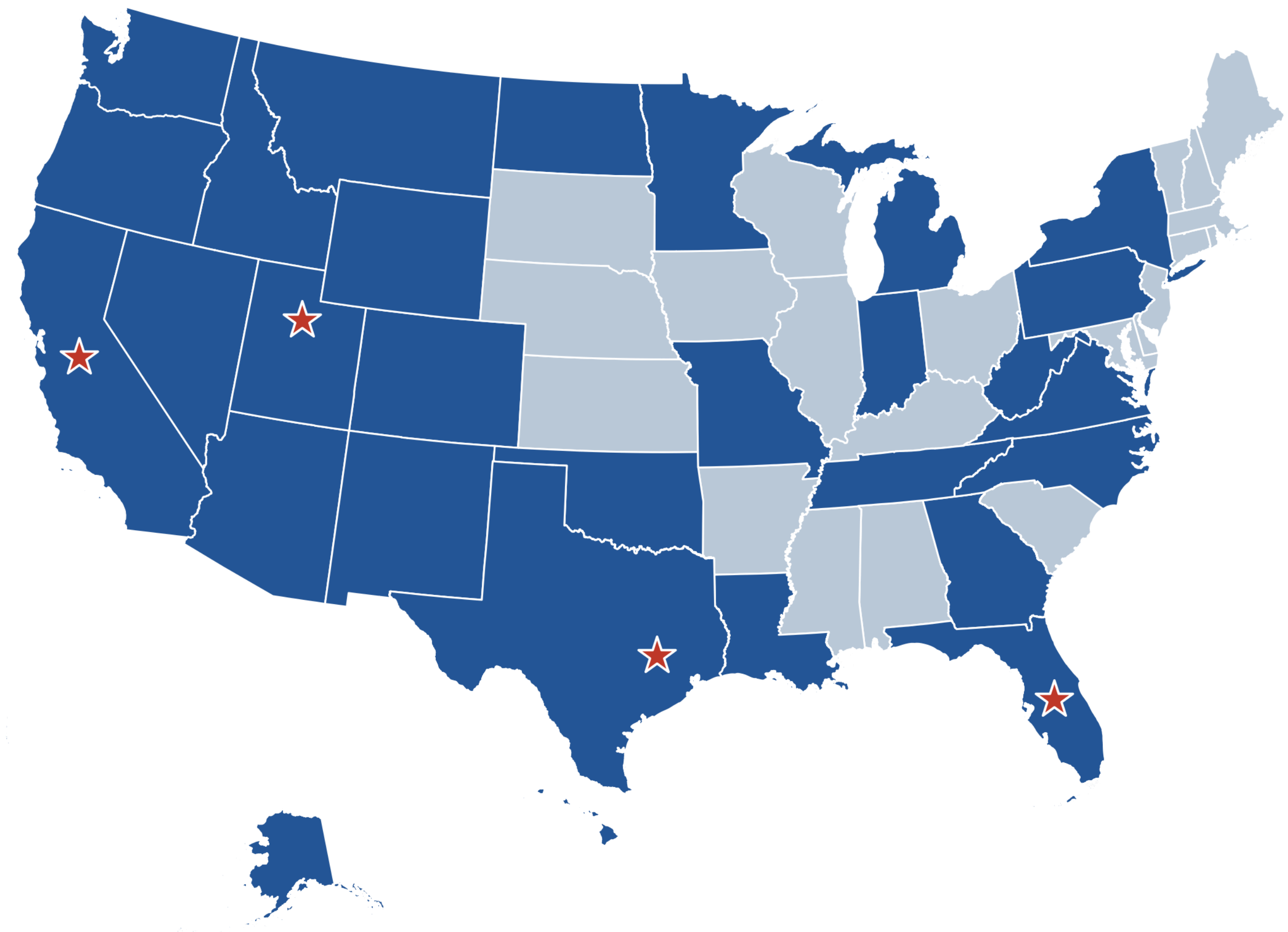
SG

Staci Goar
Communications Manager

A NATIONAL ADVISORY TEAM

Serving families coast to coast.

Promontory Financial Planning is licensed to work in all 50 states and currently serves clients across the country — with offices anchoring our presence in the West, Mountain West, and South.



States we serve — 33 & growing ★ **Office locations** — California · Utah · Texas · Florida   Licensed nationwide (all 50 states)

BY THE NUMBERS

50
States licensed to serve — SEC Registered RIA

33
States with clients today

700+
Households served nationwide

$350M+
Assets managed for valued clients

7
Investment Advisor Representatives

★ OFFICE LOCATIONS

Texas · California · Utah · Florida