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

SG

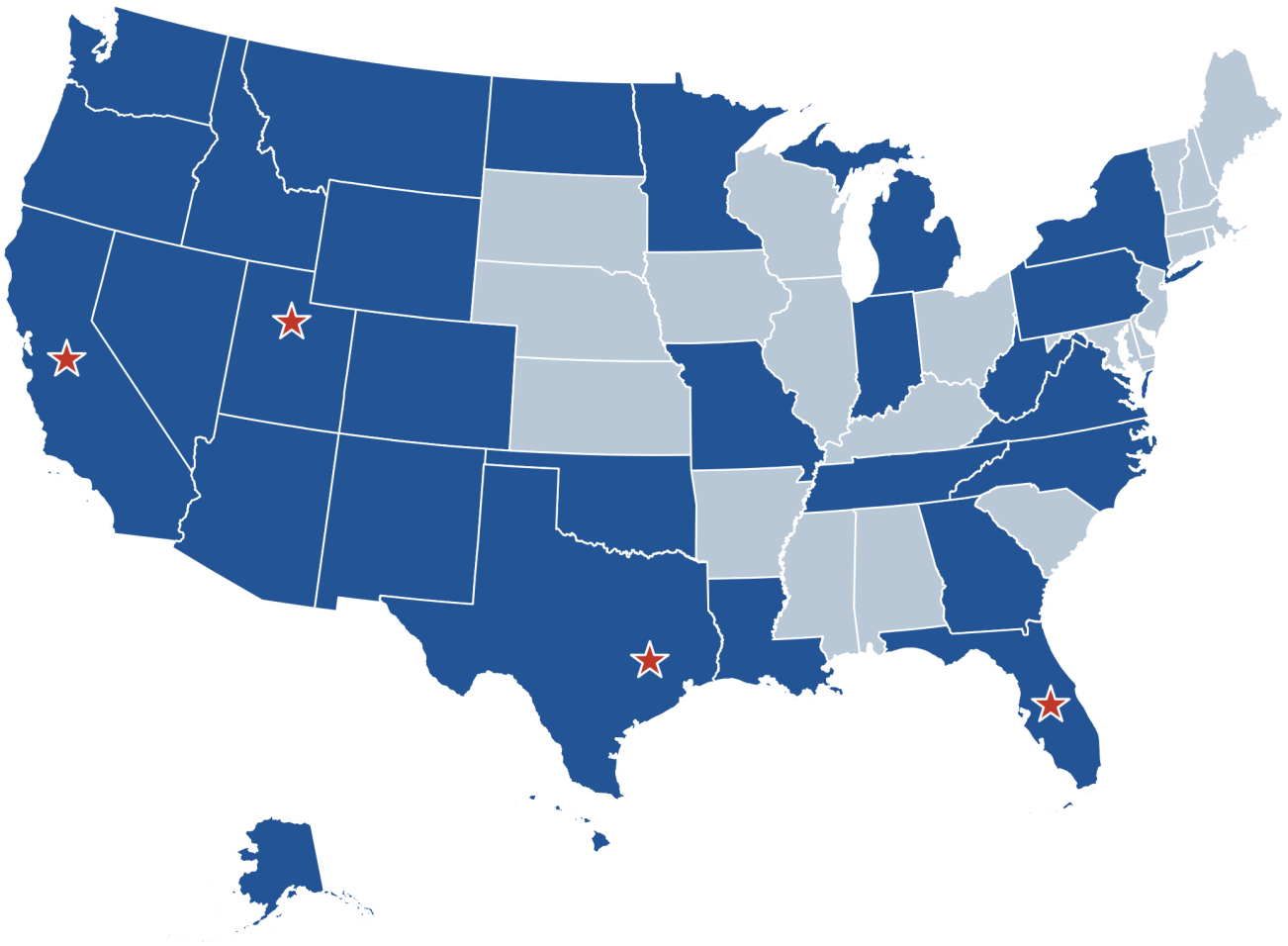
Staci Goar
Communications Manager

All advisors are Investment Adviser Representatives of Promontory Financial Planning, LLC, an SEC-registered investment adviser.

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