

Investment Oversight Board



Vice President of Financial Planning & Training

William Beaudoin, CFS, CBEC

Over 25 years of industry experience



Chief Investment Officer of Integrated Financial Partners

Rob Brown, PhD, CFA

Over 35 years of industry experience



Chief Legal Officer of Integrated Financial Partners

Chief Compliance Officer of Integrated Financial Partners

John G. Cataldo, Esq

Over 10 years of industry experience

Investment Oversight Board



Senior Vice President of Financial Planning & Training

Raymond J. Lucas, CFP, CRPC

Over 35 years of industry experience



Chief Operations Officer of Integrated Financial Partners

Ann L. Swartz, CLU, ChFC, CASL, CLF

Over 25 years of industry experience



Founder & President of Integrated Financial Partners

Chief Executive Officer

Paul Saganey, CFP

Over 25 years of industry experience