

Team Roles and Areas of Focus



growing money. solving problems.

Investment Group The Investment Group (also known as BSWig) develops the firm's economic outlook, investment strategy, and stable of managers that are then translated into investment portfolios allocated according to individual goals and sensibilities.


Advisory Group The Advisory Group handles the qualitative aspects of client relationships, identifying goals and concerns, assembling the necessary team of professionals to achieve the appropriate solution, and walking the delicate path through emotional issues surrounding wealth.

Craig Seidler
Portfolio Manager



- Portfolio Review & Implementation
- Alternative Investments
- Fixed Income

Debi Baydush | Partner
Business Strategy



- Client Outreach & Education
- Business Strategy

Ben Weaver | Partner
Advisor
CFP®



- Full range of advisory services as detailed above

Ralieggh Riddoch
Advisor
CFP®



- Full range of advisory services as detailed above

Elias Bachmann
Portfolio Manager
CFA®



- Portfolio Review & Implementation
- Direct Real Estate
- Private Equity

David Wolf | Partner
CIO/COO




- BSW Investment Strategy
- Impact Portfolio Offering
- Business Operations

Drew Simon | Partner
Advisor



- Full range of advisory services as detailed above

Tim Wojtalik
Advisor
CFP®




- Full range of advisory services as detailed above

Matt Samek
Associate Portfolio Manager



- Equity Trading
- Research/Analysis
- Financial Software Management

Tina Ottersberg
Advisor
CFP®



- Full range of advisory services as detailed above

Operations Group The Operations Group provides behind-the-scenes support that keeps the business going. This includes coordination of all paperwork necessary for client accounts and investments, money movement, specialized reporting and billing as well as being able to handle general questions and service issues.

Trisha Soares
Advisory Group Associate



- Reporting
- Advisory Support

Ashley Humphreys
Client Service Manager



- Cashiering
- Specialized Tax Reporting (K-1s)
- Alternative Investment Coordination

Sarah Goodroad
Office Manager/
Reception



- Office Management
- Scheduling
- Account Servicing
- Notary

Alexandra Martella
Partner Support



- Scheduling
- Project Work
- Special Events