



Home Office Staff Directory

To enhance communications as we continue to work remotely and to ensure your needs are addressed in a timely manner, we suggest that you use this list to determine who can best assist you.

General Inboxes

compliance@thesfa.net can be used to communicate about general compliance questions and for submitting retail communications requests.

customerservice@thesfa.net can be used to communicate about Pershing and Docupace questions, the purchasing and processing of alternative investments, trading inquiries, and general Operations requests.

duediligence@thesfa.net can be used to communicate about product- and sponsor-related questions.

info@strategicblueprint.net can be used for information about Strategic Blueprint.

marketing@thesfa.net can be used to communicate about general marketing questions, conference inquiries, questions about communications to the Field, and submissions for Advisor News and the News Center.

paymentInquiries@thesfa.net can be used to communicate about commission statement concerns and any other commission-related questions.

registrations@thesfa.net can be used to communicate about general registration questions, U4 updates, advisor address changes, additional state registration requests, new staff member paperwork, and insurance appointments.

support@thesfa.net can be used to communicate about general technology-related questions; password resets for the SFA website, M&O, and any email-related questions.

trading@thesfa.net can be used for all trade-related inquiries.

SFA Partners – Department Leaders

Executive Office

Clive Slovin - President & CEO, 678.954.4002, cslovin@thesfa.net

Arthur Goldsmith - Senior Vice President, 678.954.4006, agoldsmith@thesfa.net

Randy Gold - Executive Vice President, Chief Financial Officer (SFA Holdings, Inc.), 678.954.4080, rgold@sfaholdings.net

Nancy Purdon - Executive Assistant, 678.954.4004, npurdon@thesfa.net

Strategic Blueprint

Julie Sullivan – President, 678.954.4018, jsullivan@strategicblueprint.net

David Pittman - Executive Vice President, 678.954.4081, dpittman@strategicblueprint.net

Advisor Relations

Paige Kerr - Vice President, Advisor Relations, 678.954.4060, pkerr@thesfa.net



Home Office Staff Directory

Business Development

Jamie Mackay - Vice President, Business Development, 678.954.4058, jmackay@thesfa.net

Commissions, Operations, and Transitions

Keith McMurry - Vice President, Operations, 678.954.4070, kmcmurry@thesfa.net

Compliance

Julie Sullivan - Senior Vice President, Group Chief Compliance Officer, 678.954.4018, jsullivan@thesfa.net

Ed Woll - Chief Compliance Officer, Compliance, 678.954.4073, ewoll@thesfa.net

Due Diligence

Jean Merriman - Vice President, Due Diligence & Product Management, 678.954.4020, jmerriman@thesfa.net

Finance

LaRee Holloway - Vice President & Chief Financial Officer, 678.954.4036, lholloway@thesfa.net

Human Resources

Deborah Parsons - Vice President, Human Resources, 678.954.4022, dparsons@thesfa.net

Marketing

Stephanie Schiele - Vice President, Marketing, 678.954.4067, sschiele@thesfa.net

Supervision

Alex Sywak - Vice President, Chief Supervisory Officer, 678.954.4010, asywak@thesfa.net

Reception

Beverly Carter – Receptionist, Front Desk Coordinator, 678.954.4000, bcarter@thesfa.net

Systems & Technology

Jay Copeland - Vice President, Information System and Technology, 678.954.4008, jcopeland@thesfa.net