ABOUT US

Understanding your journey

Every new 9258 Wealth Management relationship begins with us gaining insights into your life and how you have arrived at the point to work with us. Wealth Management is not one size fits all. It's not pre-packaged, nor pre-defined. At 9258, we understand it's most effective when tailored to meet your personal financial objectives. Walking in your shoes provides us with a clear understanding of your needs, desires and wealth potential. The 9258 Wealth Management client forward

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approach, allows for a high-contact relationship placing you at the center.

Uncompromising trust and integrity are at the forefront of our advisory allowing each of our clients to engage in business with 9258 with absolute confidence. By design, those who have engaged in a relationship with our advisors find themselves relying upon us for information far beyond wealth management, hence the term “The Essential Advisors.”

Success has brought you to this point, our task is to help you realize the potential your successes have granted you.

The Values that make us 9258

INTEGRITY	INDEPENDENCE	PERSONALIZATION	TRANSPARENCY
Fiduciary responsibility keeping your best interests above our own	Operating with true passion to exponentially grow with our clients	Understanding what matters most to you now and as your needs evolve	Providing a clear understanding of your investment options

YOUR FINANCIAL FIDUCIARIES

Our goal is to provide a level of investment advisory intellect and service that will help you achieve your short term goals, long term goals, such as retirement planning, and thoughtful wealth creation.

MEET THE TEAM

Your financial advisors and staff

Walt Lunsford
AAMS®

Managing Partner

President/CEO

Matt Tranquilli
CPA, CFP®, CRPS®

Executive Vice President

Director of Retail & Retirement Plan Operations

Scot Cone
.

Executive Vice President

Investments, Director of Insurance & Risk Management

Shawn L. Fishbaugh
CFA®

Executive Vice President

Chief Investment Officer

PERSONAL BIO

PERSONAL BIO

PERSONAL BIO

PERSONAL BIO

Dean Johns

CPA, CFP®

Executive Vice President

Director – Financial Planning

PERSONAL BIO

Clayton Reynolds

CRPS®

Vice President

Investments

PERSONAL BIO

Pete Bohrofen

AIF®

Vice President

Investments

PERSONAL BIO

Tom Fields

CRPS®

Financial Advisor

PERSONAL BIO

Edwina Martin

CPA

Vice President

Assistant Director Tax Planning

PERSONAL BIO

Ryan McCarthy

.

Vice President

Assistant Director of Operations

PERSONAL BIO

Margaret Saladin Lunsford

BA, BS, MPT

PR Liaison Director

Philanthropy

PERSONAL BIO

Tom Moore

.

Chief Technology Officer

Chief Information Security Officer

PERSONAL BIO

Andrew Armstrong

.

Chief Compliance Officer

PERSONAL BIO

Kris Tranquilli

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Administrative Assistant

PERSONAL BIO

PROFESSIONAL ATHLETES

NFL Players Association Registered Financial Advisor Services

A portion of our strong heritage is rooted in planning and managing wealth for professional athletes and coaches. Understanding career longevity, earnings potential and our experience with athletic occupations, allows 9258 to tailor plans suited to your next great chapter in life.

As your coach helps you realize your potential on the playing field, the 9258 Wealth Management team are your coaches beyond the game.

LEARN MORE

BREAK FROM THE HERD

Let us help you with your financial goals.

CONTACT US

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