ABOUT US

REBY - KOELTL TEAM

GEORGE KOELTL Senior Vice President, Financial Advisor, CFP®, CDFA®, CRPC®

Series 7 & 63 Securities Registrations,* Series 65 Advisory Registration†

(203) 826-2741 gkoeltl@wealthenhancement.com

George is deeply committed to helping clients pursue and sustain financial confidence throughout retirement. His professional experience and in-depth knowledge make him exceedingly qualified to give advice on nearly any personal finance topic. As a corporate Tax Auditor for the New York State Department of Tax & Finance in 1991, he gained extensive knowledge on how to read financial statements and develop strategies to reduce income taxes. He has also served wealth management clients as a financial advisor for Merrill Lynch and UBS. Seeking an opportunity to work with a firm who shared his fiduciary values, George joined Reby Advisors in 2005 to focus on helping families and individuals take advantage of the financial opportunities in their lives. In 2021, he joined Wealth Enhancement Group through the Reby Advisors acquisition. George lives in Valhalla, New York with his wife Eileen and has three grown children. In his spare time, he enjoys cooking, kayaking and golf. He is also an avid sports fan, and he can talk Yankees or Knicks with the most loyal of fans.

- BS, Lehman College
- CERTIFIED FINANCIAL PLANNER™ Professional
- Certified Divorce Financial Analyst
- Chartered Retirement Planning Counselor

ROBERT REBY Senior Vice President, Financial Advisor, CFP®

Series 6, 22, 24, 62, 63 Securities Registrations*

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Bob founded Reby Advisors shortly after he graduated college. It was important for him to pursue his dreams and passion for personal finance by helping other people pursue financial stability. After nearly three decades in business, he joined Wealth Enhancement Group through the acquisition of his firm. He is active in numerous professional organizations including The World Presidents' Organization. Outside the office and the world of personal finance, he lives in Palm Beach Gardens, Florida with his wife, Mary. He is also an avid golfer and tennis player. He has earned a national final ranking as high as 30th in the United States Tennis Association in the Senior Division.

- BA - Finance, James Madison University
- CERTIFIED FINANCIAL PLANNER™ Professional

LAURIE HAM Regional Director, CFP®

Series 7, 24, 51 Securities Registrations,* Series 65 Advisory Registration†

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Laurie has more than 20 years of experience in financial services operations. She started her career with Northeast Bank in Minneapolis, near her hometown, and joined Reby Advisors in 2000 shortly after moving to Connecticut with her family. She has a passion for turning big ideas into reality through research, planning, and is known for her roll-up-your-sleeves work ethic. She joined Wealth Enhancement Group in 2021 through the Reby Advisors acquisition where she will be responsible for the execution of strategies for the advisory service programs in the region. Outside the office, Laurie is an avid traveler, visiting destinations far and wide, from Waco, TX to China. She also loves visiting her grandchildren in Colorado. At her home in the quaint town of Sherman, Connecticut, she enjoys baking and hosting events.

- BA, Concordia University – St. Paul
- MBA, Concordia University – St. Paul
- CERTIFIED FINANCIAL PLANNER™ Professional

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* Securities registrations are held with LPL Financial, Member FINRA/SIPC.
† Advisory registrations are held with Wealth Enhancement Advisory Services.

Wealth Enhancement Group®

1-05114113 2/2021