

## With you at every Point ...

## **MEET YOUR FINANCIAL MANAGEMENT & TRUST SERVICES TEAM**

Specialized financial planning tailored for the unique challenges and opportunities at every stage of life. Our Wealth Solutions team has the expertise to provide the support and guidance you need to reach your goals. Our clients work with us because they trust our local wealth planning professionals to bring true peace of mind and confidence to their financial decisions. We are devoted to building financial success stories one client at a time.



Pamela K. Fleener
Senior Vice President &
Wealth Advisor
(515) 663-3034
Pam.Fleener@FNB247.com
Role: Department Manager Trust
& Investments. Builds long-term
client relationships through
dedicated customer service, while
providing solutions focused on
client needs.



Cynthia L. Inbody
Senior Vice President &
Wealth Advisor
(515) 663-3036
Cindy.Inbody@FNB247.com
Role: Administers and manages
accounts in a wide variety of
fiduciary capacities through
personalized service. Oversees
real estate management.



Jared T. Bravard
Wealth Advisor
(515) 663-3022
Jared.Bravard@FNB247.com
Role: Administers and manages
accounts in a wide variety of
fiduciary capacities through
personalized service.
Assists with process improvement
initiatives.



Tiffany M. Mozena
Assistant Wealth Advisor
(515) 663-3050
Tiffany.Mozena@FNB247.com
Role: Administers and
manages accounts in a wide
variety of fiduciary capacities
through personalized service.
Provides Medallion Signature
Guarantee Services.



Nick Johnson, CFA
Senior Vice President &
Portfolio Manager
(515) 663-3061
Nick.Johnson@FNB247.com
Role: Tailors client portfolios
to meet investment goals and objectives.



## irst Point With you at every Point...

## **MEET YOUR FINANCIAL MANAGEMENT & TRUST SERVICES TEAM**



Keri S. Kain
Vice President & Wealth
Operations Manager
(515) 663-3070
Keri.Kain@FNB247.com
Role: Oversees daily operations
and processes. Manages
operations support staff.



Holly L. Bowman
Administrative Assistant
(515) 663-3052
Holly.Bowman@FNB247.com
Role: Provides efficient
customer service and
administrative support.



Veronika A. Johnson
Administrative Assistant
(515) 663-3031
Veronika.Johnson@FNB247.com
Role: Provides efficient
customer service and
administrative support.



Briana A. Bairey
Wealth Operations Administrator
(515) 663-3105
Briana.Bairey@FNB247.com
Role: Processes client expenses,
tax payments, distributions, and
cash transfers.



Erin N. Howard
Wealth Operations Administrator
(515) 663-3038
Erin.Howard@FNB247.com
Role: Processes client income,
trades, corporate actions, and
statements; reconciles accounts,
and enters account data.



Danielle N. Miller
Wealth Operations Administrator
(515) 663-3048
Danielle.Miller@FNB247.com
Role: Processes asset transfers,
prepares annual client reviews,
and provides operational support.