



Who to call at Trustmont?

Accounting/1099s	Alicia Walker	alw@trustmontgroup.com	
Advertising/Marketing Approval Questions (submission form located on the Trustmont website)	Donald Sada	das@trustmontgroup.com	125
AI Insight	Anthony Hladek	ach@trustmontgroup.com	121
Alternative Investment Approvals	Anthony Hladek	ach@trustmontgroup.com	121
Annual Representative Questionnaire Inquiries	MaryLynne Hixenbaugh	mlh@trustmontgroup.com	119
Anti-Money Laundering	Anthony Hladek	ach@trustmontgroup.com	121
Branch Office Exams	Donald Sada	das@trustmontgroup.com	125
Branch Office Registration	Amanda Ickes	ami@trustmontgroup.com	112
Client Profile Forms & Negative Response letters	Audrey Zias	alz@trustmontgroup.com	110
Commissions	Missy Cosharek	mic@trustontgroup.com	124
Compliance	MaryLynne Hixenbaugh	mlh@trustmontgroup.com	119
	Donald Sada	das@trustmontgroup.com	125
Consolidated Reports	Donald Sada (questions)	das@trustmontgroup.com	125
	Reports (to submit copies/requests for approval)	reports@trustmontgroup.com	
Discretionary Authority Approvals (Beneficiary, POA, Executor, etc)	MaryLynne Hixenbaugh	mlh@trustmontgroup.com	119
Document Deficiencies	Audrey Zias	alz@trustmontgroup.com	110
Email Setup/Password Reset	Lacey Dochinez	lmd@trustmontgroup.com	127
Jacomo/JCore	Missy Cosharek	mic@trustontgroup.com	124
Licensing	Amanda Ickes	ami@trustmontgroup.com	112
Log Questions <ul style="list-style-type: none">• Monthly Check & Correspondence• Quarterly Gift & Gratuity	Gio Vonne Sanders	gjs@trustmontgroup.com	115
	(submission forms located on the Trustmont website)		
Managed Account Platform	Anthony Hladek (trades/add accounts)	ach@trustmontgroup.com	121
	Lacey Dochinez (paperwork/billing)	lmd@trustmontgroup.com	127
Morningstar Annuity Intelligence (VAs)	Audrey Zias	alz@trustmontgroup.com	127
Mutual Fund Account Approvals	Anthony Hladek	ach@trustmontgroup.com	121
Outside Business Activities (update/add/delete)	Donald Sada (questions)	das@trustmontgroup.com	125
	Compliance (to submit)	compliance@trustmontgroup.com	

Outside Services Inquiries: -CRM -Online meeting -Financial Planning -3 rd Party Fax Service - Shredding Service	MaryLynne (questions) Compliance (to submit)	mlh@trustmontgroup.com compliance@trustmontgroup.com	119
Paperwork Questions/Processing <ul style="list-style-type: none"> Trustmont internal paperwork Fund Company paperwork questions Charles Schwab paperwork RBC paperwork questions 	Audrey Zias Contact Fund Company directly (see list) IG20 Team/Oliver 866-222-1014 Field Service Group 800-949-0242	alz@trustmontgroup.com	110
Personnel (add/update/remove)	MaryLynne Hixenbaugh (questions) Compliance (to submit)	mlh@trustmontgroup.com compliance@trustmontgroup.com	119
Political Contribution Inquiries/Approvals	MaryLynne Hixenbaugh (questions) Compliance (to submit)	mlh@trustmontgroup.com compliance@trustmontgroup.com	119
Portfolio Pathways	Lacey Dochinez	lmd@trustmontgroup.com	127
RBC	Audrey Zias	alz@trustmontgroup.com	110
Regulatory Inquiries	Anthony Hladek MaryLynne Hixenbaugh	ach@trustmontgroup.com mlh@trustmontgroup.com	121 119
Renewal Billing	Alicia Walker	alw@trustmontgroup.com	
Rep Personal Account Inquiries (submission form located on the Trustmont website)	Donald Sada	das@trustmontgroup.com	125
Selling Agreements	Anthony Hladek	ach@trustmontgroup.com	121
Signature Guarantee	Anthony Hladek	ach@trustmontgroup.com	121
Social Media/Website Usage/Approval	Donald Sada	das@trustmontgroup.com	125
Charles Schwab Account Approvals	Anthony Hladek	ach@trustmontgroup.com	121
Charles Schwab Billing	Lacey Dochinez	lmd@trustmontgroup.com	127
Text Messaging Setup/Questions	Gio Vonne Sanders	gjs@trustmontgroup.com	115
Trade Pre-Approvals (Personal Accounts)	MaryLynne Hixenbaugh	mlh@trustmontgroup.com	115
U4 Updates	Notification to Compliance	compliance@trustmontgroup.com	
Variable Annuity Account Approvals	Anthony Hladek	ach@trustmontgroup.com	121
Webinars	Gio Vonne Sanders	gjs@trustmontgroup.com	115
Website (Trustmont)	Lacey Dochinez	lmd@trustmontgroup.com	127