



Who to call at Trustmont?

Accounting/1099s	Alicia Walker	alw@trustmontgroup.com	
Advertising/Marketing Approval Questions (submission form located on the Trustmont website)	Jessica Hartman	jhartman@trustmontgroup.com	136
AI Insight	Anthony Hladek	ach@trustmontgroup.com	121
Alternative Investment Approvals	Anthony Hladek	ach@trustmontgroup.com	121
Annual Representative Questionnaire Inquiries	Jessica Hartman	jhartman@trustmontgroup.com	136
Anti-Money Laundering	Anthony Hladek	ach@trustmontgroup.com	121
Branch Office Exams	Jessica Hartman	jhartman@trustmontgroup.com	136
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 (CCO) Jessica Hartman (Analyst)	mlh@trustmontgroup.com jhartman@trustmontgroup.com	119 136
Consolidated Reports	Jessica Hartman (questions) Reports (to submit copies/requests for approval)	jhartman@trustmontgroup.com reports@trustmontgroup.com	136
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	Jessica Hartman	jhartman@trustmontgroup.com	136
<ul style="list-style-type: none"> • Monthly Check & Correspondence • Quarterly Gift & Gratuity 	(submission forms located on the Trustmont website)		
Managed Account Platform	Anthony Hladek (trades/add accounts) Lacey Dochinez (paperwork/billing)	ach@trustmontgroup.com lmd@trustmontgroup.com	121 127
Morningstar Annuity Intelligence (VAs)	Lacey Dochinez	lmd@trustmontgroup.com	127
Mutual Fund Account Approvals	Anthony Hladek	ach@trustmontgroup.com	121
Outside Business Activities (update/add/delete)	Jessica Hartman (questions) Compliance (to submit)	jhartman@trustmontgroup.com compliance@trustmontgroup.com	136

Outside Services Inquiries: -CRM -Online meeting -Financial Planning	Jessica Hartman (questions) Compliance (to submit)	jhartman@trustmontgroup.com compliance@trustmontgroup.com	136
Paperwork Questions/Processing • Trustmont internal paperwork • Fund Company paperwork questions • TD Ameritrade paperwork questions • RBC paperwork questions	Audrey Zias Contact Fund Company directly (see list) TD Core East Team 1-888-354-8361 opt 2, opt 12 RBC Training & Support 1-800-949-0242 opt 1	alz@trustmontgroup.com	110
Personnel (add/update/remove)	Jessica Hartman (questions) Compliance (to submit)	jhartman@trustmontgroup.com compliance@trustmontgroup.com	136
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)	Jessica Hartman	jhartman@trustmontgroup.com	136
Selling Agreements	Anthony Hladek	ach@trustmontgroup.com	121
Signature Guarantee	MaryLynne Hixenbaugh	mlh@trustmontgroup.com	119
Social Media/Website Usage/Approval	Jessica Hartman	jhartman@trustmontgroup.com	136
TD Ameritrade Account Approvals	Anthony Hladek	ach@trustmontgroup.com	121
TD Ameritrade Billing	Lacey Dochinez	lmd@trustmontgroup.com	127
Text Messaging Setup/Questions	Jessica Hartman	jhartman@trustmontgroup.com	136
Trade Pre-Approvals (Personal Accounts)	Jessica Hartman	jhartman@trustmontgroup.com	136
U4 Updates	Amanda Ickes	ami@trustmontgroup.com	112
Variable Annuity Account Approvals	Anthony Hladek	ach@trustmontgroup.com	121
Webinars	Jessica Hartman	jhartman@trustmontgroup.com	136
Website (Trustmont)	Lacey Dochinez	lmd@trustmontgroup.com	127