

Montgomery County Broker/Dealers/Banks Approved as of July 14, 2026

Approved Mutual Funds

FHN Financial Securities Corp

920 Memorial City Way, 11th Floor
Houston, TX 77024
fhnfinancial.com

Buddy Saragusa - Vice President
buddy.saragusa@fhnfinancial.com
(713)435-4475

Tyler Williamson - Senior VP/MGR
tyler.williamson@fhnfinancial.com
(713)435-4349

Fifth Third Securities

38 Fountain Square Plaza
Cincinnati, OH 45263
securitiesadvisors.53.com

Maria Lubag - Analyst
maria.lubag@53.com
(615)270-8395

John Herald - Executive Director
john.herald@53.com
(615)687-6149

Great Pacific Securites

151 Kalmus Drive, Ste H-8
Costa Mesa, CA 92626
greatpac.com

Garrett Ng - Institutional Acct. Exec.
gng@greatpac.com
(714)619-3000

Christopher Vinck Luna - CEO
cvinck@greatpac.com
(714)619-3000

Hilltop Securities

717 N Harwood Street
Dallas, TX 75201
hilltopsecurities.com

Gilbert Ramon - Vice President
Gilbert.Ramon@hilltopsecurities.com
(713)654-8606

Cory Clark - MD Head of Instit. Sales
cory.clark@hilltopsecurities.com
(312)706-0795

Mischler Financial Group

1111 Bayside Dr. Ste 100
Corona del Mar, CA 92625
mischlerfinancial.com

Steve Neri - Institutional Fixed Income
sneri@mischlerfinancial.com
(949)629-7627

Doyle L. Holmes - President
dholmes@mischlerfinancial.com
(949)720-0640

Oppenheimer & Co., INC.

100 South First St., Ste 2200
Minneapolis, MN 55402
opco.com

Chris Sullivan - Exec. Director Inv.
chris.sullivan@opco.com
(612)337-2719

Cary Holcomb - Managing Director
cary.holcomb@opco.com
(212)667-5307

Stern Brothers

8000 Maryland Ave., Ste 800
St. Louis, MO 63105
sternbrothers.com

Wes Hall - VP Taxable Fixed Income
whall@sternbrothers.com
(314)499-9537

Reginald Scantlebury-Sr. Managing Dir.
rscantlebury@sternbrothers.com
(917)284-0856

Stifel Nicolaus & Company

501 North Broadway
St. Louis, MO 63102
stifel.com

Josh Gorham - Managing Director
gorhamj@stifel.com
(800)488-0970

Demetri Patikas - Nat. Sales Mngr.
patikasd@stifel.com
(901)762-5314

Wells Fargo Securities, LLC

550 South Tryon Street, 6th Floor
Charlotte, NC 28202
wellsfargo.com

Chuck Landry - Executive Director
chuck.landry@wellsfargo.com
(214)777-4018

Margaret Leffke - Managing Director
margaret.leffke@wellsfargo.com
(704)410-4571

Woodforest Wealth Strategies

1330 Lake Robbins Dr., Ste 150
The Woodlands, TX 77380
woodforestwealth.com

Rudy Wentzler - Senior VP
rwentzler@woodforestwealth.com
(832)375-2500

Jonathan Cheatham-Super. Principal
jonathan.cheatham@raymondjames.com
(727)567-0512

**Montgomery County
Broker/Dealers/Banks Approved
as of July 14, 2026**

Pools

Logic Investments

717 N Harwood St., Ste 3400
Dallas, TX 75201
logic.org

Mary Ann Dunda - Managing Dir.
maryann.dunda@hilltopsecurities.com
(214)953-4086
Mica Owens - Senior Vice President
mica.owens-weary@hilltopsecurities.com
(214)953-4199

Texas CLASS

717 17th St., Ste 1850
Denver, CO 80202
texasclass.com

Tony Sekaly - Reg. Dir. Of Marketing
tony.sekaly@publictrustadvisors.com
(713)502-8575

TexPool

1001 Texas Ave., Ste 1150
Houston, TX 77002
texpool.com

David Perez
david.perez@federatedhermes.com
(626)255-9165

TexSTAR Participant Services

717 N Harwood Street
Dallas, TX 75201
tx-fit.com

Mary Ann Dunda - Managing Dir.
maryann.dunda@hilltopsecurities.com
(214)953-4086
Mica Owens - Senior Vice President
mica.owens-weary@hilltopsecurities.com
(214)953-4199

TX FIT

12951 Huebner Rd 780547
San Antonio, TX 78230
tx-fit.com

Ken Couch - Dir. Business Dev.
ken@deepblue-inv.com
(210)605-9012
Brent Wertz - Managing Partner
brent@deepblue-inv.com
(813)321-3249

**Montgomery County
Broker/Dealers/Banks Approved
as of July 14, 2026**

Banks

Frost Bank

111 W. Houston St.
San Antonio, TX 78205
frostbank.com

Jeff Beckel - Senior Exec. VP
jeff.beckel@frostbank.com
(210)220-6147
Trace Hayles - VP
trace.hayles@frostbank.com
(210)220-5210

Texas First Bank

19940 Eva St.
Montgomery, TX 77356
texasfirst.bank

Natalie Saikowski Goertz - Tre. Mngmt
natalie.goertz@texasfirst.bank
(281)413-6266
Ryan Doyle - CFO
rdoyle@texasfirst.bank
(409)766-4350