

# Meet the Client Success Team

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Client Success

TagsTeam

## Meet the Client Success Team

You can contact the team at [clientsuccess@financialgravity.com](mailto:clientsuccess@financialgravity.com), or calling 1-800-588-3893, option 2.

### Team Member Extensions

|                             |                             |
|-----------------------------|-----------------------------|
| McKensy Taylor: Ext. 7612   | Jill Henderson: Ext. 2100   |
| Samantha Winters: Ext. 7167 | Holly Strickland: Ext. 2500 |
| Elissa Penniman: Ext. 7164  | Kara Cazares: Ext. 2800     |
| Lauren Alexander: Ext. 7165 | Patricia Montano Ext. 2900  |
| Laura Wagner: Ext. 2300     |                             |

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## MEET YOUR CLIENT SUCCESS TEAM

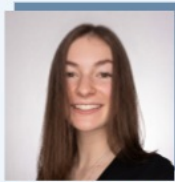
We're here to partner with you, support your goals, and help you get the most from our services. Our team brings deep expertise, genuine care, and a shared commitment to your success.



**McKensy Taylor**  
Director of Operations  
B.B.A. in Accounting



**Jill Henderson**  
EVP of Client Advisory Success  
B.A. in Communications  
Series 8, 7, 24, 83, and 65 licensed  
California insurance licensed



**Samantha Winters**  
Senior Operations Specialist



**Holly Strickland**  
Senior Client Relationship Specialist  
NM State Insurance Licensed



**Lauren Alexander**  
Operations Specialist  
B.A. in English and Literature



**Kara Cazares**  
Client Relationship Specialist  
Financial Paraplanner Qualified Professional™



**Patricia Montano**  
Client Relationship Specialist



**Elissa Penniman**  
Operations Specialist  
B.B.A. in Management



**Laura Wagner**  
Client Relationship Specialist  
Series 99

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