


Speakers

 Dunham Advisory Board
May 20 & 21, 2026



Ann Rosevear, Esq.

Ann Rosevear serves as President and Chief Trust Officer (CTO) for Dunham Trust, providing expert structuring and administration of trusts to Dunham Trust's most complex clients. As President, Ann contributes comprehensive knowledge in trust and estate administration, asset protection and Nevada business planning, as well as overseeing the firm's adherence to fiduciary, regulatory and compliance requirements. As CTO, Ann provides highly attentive trustee services, paying particular attention to risk management issues, discretionary actions, on-going tax planning, communication with co-trustees, beneficiary needs, and professional advisor performance and dedication. Ann offers a well-rounded leadership role and collaborates regularly with families, legal counsel, financial advisors and tax experts in order to

promote innovative approaches and fiduciary best practices to our clients.

Prior to joining Dunham Trust, Ann spent 14 years as a principal attorney at Walsh, Baker & Rosevear, P.C. in Reno, focused primarily on estate and business planning, probate, and investment and annuity transfer and underwriting, managing a multi-state practice.

She is also a member in good standing before the State Bar of Nevada and is licensed to practice law in Nevada, with inactive licenses in Oregon and Washington. Ann presently serves on the Nevada Bankers Association Trust Committee, as President of the Northern Nevada Estate Planning Counsel, and holds the NAEPC Advanced Estate Planner (AEP) designation.



Andrew Hokenson, CFA

Andrew joined Pier in 2006 and his responsibilities include conducting equity research for the Firm's Small and Mid Cap Growth strategies.

Prior to joining Pier, Andrew worked at Benefit Providers from 2003 until 2004, where he worked in the private client group and wealth management area. From 2002 to 2003 he was at Fordham Financial, where he worked on risk management, insurance and tax and estate planning.

Andrew received his BA from Carleton College in 2002 and his MBA from Rutgers University in 2006.



Bill Cassidy

Bill Cassidy brings over three decades of comprehensive financial services experience to his role as Senior Vice President in Customers Bank's Financial Institutions Group (FIG). His diverse career spans both banking and wealth management, giving him a unique perspective and valuable insight in his role leading Advisor Banking for FIG and working predominately with Registered Investment Advisors and their clients.

Bill's banking career includes four years as Vice President in Cash Management at Bank of America, six years as Executive Vice President at The Bancorp Bank, and three years as Managing Director at Advisor Credit Exchange.


Prior to banking, Bill spent more than 30 years in wealth management, working with broker-dealers

and asset management firms, including over 22 years with SEI in the United States and Asia.

A Penn State University graduate, Bill previously held several financial industry credentials including FINRA Series 6, 63, 7 and 24 licenses, as well as Principal Designations for Advising (Type 4) and Portfolio Management (Type 9) from the Hong Kong Securities & Futures Commission.

Bill is actively involved with several community organizations including Wreaths Across America, Tunnels to Towers and the Union League of Philadelphia.

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Brandon Wilson

Brandon Wilson is Director of Information Technology and Chief Information Security Officer for Dunham and Dunham Trust. At Dunham, Brandon is responsible for supporting and innovating technology and striving to protect users in the realm of cybersecurity.

Brandon has over 20 years of IT experience, including experience with worldwide technical support companies, San Diego Law Firms, IT contractor for the military on NMCI Projects as well as a San Diego based biotech firm before joining the Dunham team. As a leading professional in his discipline, Brandon's technical prowess spans many technical areas including, but not limited to computer networks, cybersecurity, coding, AI, crypto, and graphic design. Throughout Brandon's

career the focus has always been to provide outstanding customer service in a highly functioning technical environment to all end users to do more in less time utilizing technology.



Daniel Sands, CFP

Daniel Sands is the Director of Trust Investments for Dunham Trust. He is responsible for the day-to-day management of portfolio assets for Dunham Trust and works in concert with the Dunham Analyst team. Daniel provides wealth management, portfolio implementation, and investment oversight using a consultative approach incorporating existing financial advisors and Dunham Trust Trust Officers. He reviews and analyzes investment programs, asset allocations, and investment goals to help achieve desired results for all stakeholders.

Daniel brings two and half decades of experience in the financial services industry to Dunham Trust. He started his career with Trust Company of America in 1995, where he gained knowledge of custodial trust services, and helped pioneer the first Internet-based model trading software for institutional investors in the industry. In 2000, Daniel changed over to the independent Regis-

tered Investment Advisory and Broker/Dealer side of the business. From time spent as Director of Operations to Managing Partner, and Wealth Manager to Financial Planner, Daniel is intimately familiar with all aspects of managing client relationships and running financial advisory practices.

Daniel is a CERTIFIED FINANCIAL PLANNER professional. He completed his CFP® Board of Standards education program at University of California, Irvine and graduated Magna Cum Laude from Cal Poly, Pomona where he earned a B.S. in Business Administration and majored in Finance, Real Estate, and Law. He holds FINRA Series 7, 24, and 66 registrations. Daniel lives in Reno with his family and loves exploring the beautiful backcountry in the area. He is an avid outdoorsman with a passion for skiing and mountain biking. Daniel also coaches youth sports.



David Itzkovits, CFA

David Itzkovits is the co-founder of Optimal AdvisorAI, the AI Learning Partner for financial services firms.

His firm has trained thousands of advisors and financial professionals across Fortune 500 companies, major custodians, broker-dealers, asset managers, and global investment banks. Optimal AdvisorAI helps teams simplify AI and adopt it effectively, delivering training built by financial professionals for financial professionals.


With over 3,000 hours and 10,000+ prompts tested in real-world financial use cases, David has learned how to get better answers from AI: answers that are clear, useful, and relevant to how financial professionals work.

Before launching Optimal AdvisorAI, he led high-performing business development teams as a CEO, selling directly to institutions and financial advisors. He also managed more than \$635 million in client assets as a private banker, giving him a firsthand understanding of how advisors think, operate, and serve clients.

David brings 25 years of experience in financial services and has held senior roles at top-tier institutions. He was also a founding member of a fintech startup that was later acquired by a \$50 billion global investment firm.

He is a globally recognized speaker on AI in financial services, a CFA Charterholder, and holds a Bachelor of Science from McGill University and an MBA from the Ivey Business School at Western University.

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David Osgood

David Osgood is a Trust Officer for Dunham Trust in Reno, Nevada, and is responsible for administering trusts and overseeing investment. David works closely with clients, financial advisers, and other personnel on trust and estate matters.

Prior to joining Dunham Trust, David started his career with Capital Group Companies, where he worked as a Trust Officer. Most recently, David worked with an investment banking firm securing venture capital funding for several up-and-coming companies.

David has a Bachelor's degree in Accounting and a Master's degree in Finance from Pepperdine University. He lives in Reno with his partner and their son, and is an avid skier and outdoorsman.



Dennis Moseley-Williams

Dennis Moseley-Williams is a globally recognized expert on customer experience and belonging, helping financial professionals transform how they connect with clients in a world where loyalty is no longer enough.

As an Experience Economy pioneer, Dennis has spent more than 20 years working with financial professionals and business leaders to move beyond transactions and create meaningful, lasting relationships. Today, his work is centered on one core idea: those who build a sense of belonging don't just retain clients—they turn them into advocates—and advocates drive referrals, growth, and long-term value.

Dennis is the founder of Dennis Moseley-Williams Strategic Consulting and co-founder of the

Serious Shift Community for financial advisors. He is a pioneering member of the World Experience Organization and a contributor to leading experience design programs.

He is also the author of *Serious Shift: How Experience Staging Can Save Your Practice*, and his keynote presentations challenge audiences to rethink how they show up, differentiate their business, and create environments where clients feel seen, valued, and connected.



Helmut Boisch, PMP


Helmut Boisch is the Chief Operating Officer of Dunham. His past work includes senior roles across Operations, Information Technology, and Compliance. During his 20 years of financial services industry experience, Helmut has been involved in a number of transformative projects. These include helping large global businesses scale their operational processes in the front, middle, and back offices. Other projects included the migration of portfolio order management systems, compliance systems, the onboarding of fund administration and custody outsource solutions, as well as establishing middle office efficiencies and scaling opportunities.

Prior to joining the firm in 2022, Helmut served in a variety of roles including Global Head of Vendor Management for Allianz Global Investors with a team located in Frankfurt, Munich, New York, and San

Diego. During this time, he managed a portfolio of Operations, IT, and Product department key strategic vendors. Helmut also served as US Head of Operations Project Management where he created a project management platform. Before this he was the Deputy Chief Compliance Officer for a US Registered Investment Advisor and US 1940 Act Mutual Funds.

Also, Helmut has previously served as Global Head of Investment Compliance for AIG Asset Management and had various roles in IT, Operations, and client servicing at Neuberger Berman, Lehman Brothers, and Bloomberg LP. Helmut also founded a software company providing finance and government operations workflow solutions as well as compliance and law enforcement software solutions.

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Jason Greer, CFA

Jason G. Greer, CFA, is the Senior Investment Analyst at Dunham, where he supports the Chief Investment Officer across investment operations, including asset allocation design, manager due diligence, and strategic research initiatives.

Jason began his career on the floor of the New York Stock Exchange, an experience that shaped his perspective on market structure and trading dynamics. With over a decade at Dunham, he brings a disciplined, research-driven approach to portfolio construction and market insights, supporting the firm's financial advisors with actionable intelligence on the economy and investment landscape.

He holds a B.B.A. in Finance from the University of San Diego, the CFA designation, and FINRA

Series 7, 65, and 63 registrations.

Jason lives in San Diego with his wife Amanda, son Max, and their wolf hybrid Kaya. Outside the office, he enjoys golfing, surfing, and hiking.



Jeffrey Dunham

Jeffrey A. Dunham is the Chairman and CEO of Dunham and Dunham Trust. Acting as an industry visionary, Jeffrey launched Dunham upon the premise of performance-based advisory compensation. In his view, performance-based advisory compensation provides investors with a level of accountability which is as important today as when he founded Dunham in 1985. When he launched the Dunham Funds in 2004, he transferred that belief to a compensation structure applied to the Sub-Advisers of the Dunham Funds. Today, we believe that the Dunham Funds still stand as one of the only fund families in the industry where 100% of the Sub-Advisers are paid based on their ability to outperform their benchmarks.

Wanting to expand the concept of asset management accountability nationally, Jeffrey expanded his private client business model in the mid-1990s to work with Financial Advisors nationwide to invest in Dunham Funds and with Dunham Trust on behalf of their clients so these financial advisors could counsel the families they work with across multiple generations. In addition, Jeffrey has extensive experience in real estate investing.



Marie Swift

Marie Swift is Founder and CEO of Impact Communications, a full-service PR and marketing communications firm that works solely within the financial services industry.


A prolific writer, Marie's articles have been published by Barron's, MarketWatch, Forbes, WealthManagement.com, NAPFA Advisor, RIA Intel, Financial Planning, Financial Advisor, ThinkAdvisor.com, Morningstar Advisor, Executive Roundtable Journal, and more. She has been quoted in respected publications such as The Wall Street Journal, RIABiz.com, and Investment Advisor magazine.

Marie is in demand as a speaker at conferences for financial services professionals including Dimensional Fund Advisors, AICPA PFP/CIMA Summit, TD Ameritrade LINC, Pershing Insite, Fidelity's Inside

Track, Schwab Regional Advisor Symposiums, the Financial Planning Association, the National Association of Personal Financial Advisors, the Alliance of Comprehensive Planners, InvestmentNews' Women To Watch, Financial Planning's Women Advisors Forum, Bob Veres' Insider's Forum, Jolt! Marketing Conference, Securities America, United Planners, Transamerica, Cetera, and other independent advisor and broker/dealer conferences.

In 2021 and 2022, Impact Communications earned recognition from WealthManagement.com in their annual "Wealthies" awards competition, and ThinkAdvisor.com named Marie to their Luminaries Class of 2021. She has twice been a member of the Forbes Agency Council, a by-invitation-only consortium of marketing and PR professionals who meet the high standards of the Council program.

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Mark Pace, CLU, RHU, ChFC

As the founder of The Vital Longevity Institute, and the creator of the Vitalign System and the Complete Wealth Planning System, Mark challenges the assumptions that quietly shape how people live, work, and prepare for the future. He exposes the hidden beliefs that limit possibility, drain vitality, and undermine long-term fulfillment.

More importantly, he replaces them.

Drawing on more than 40 years of entrepreneurial experience, 20 years of focused research, and extensive real-world application, Mark teaches a practical, proven process for creating rapid, lasting, positive change. His work helps people reset their internal "life clock," so their future becomes bigger, better, and more compelling than their past, regardless of age.

Mark is also the founder of ObjectiView, where he developed a system that optimizes life insurance performance using proprietary life expectancy data. He is an internationally recognized speaker and author, delivering both keynote presentations and intensive workshops for professionals and organizations seeking a new model for living well, longer.



Michael Mortimore

Michael Mortimore joined NS Partners in February 2022 as a Client Relationship Manager. Prior to NS Partners, he worked in roles as a Product Specialist for EM equities investment manager Somerset Capital, a Client Services Adviser for Macquarie Bank and as a Legal Analyst for Societe Generale. He holds a BA in Politics and International Relations from the University of Cambridge, and a Master of Laws from the Queensland University of Technology.




Nehemiah McFarlin

Nehemiah is the West Regional Director for Dunham, focused on helping financial advisors to raise assets using Dunham's institutionally managed mutual funds, Asset Allocation Program and Dunham Trust's Nevada-based trust services. Nehemiah possesses a wealth of knowledge and experience in the realm of advanced tax and estate planning strategies, a skill set that advisors frequently leverage to set themselves apart and seize opportunities presented by substantial liquidity events. Specializing in attracting and retaining substantial pools of assets, Nehemiah demonstrates a remarkable ability to cultivate lasting client relationships and foster loyalty. His strategic approach not only secures assets but also ensures their longevity, making him an invaluable asset to any financial team. Nehemiah

was a student athlete at Idaho State University and joined Dunham in 2021. Nehemiah has a B.A. in Business Administration, with an emphasis in Finance, Management & Marketing, and holds his FINRA Series 7 and 66 registration.

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Rebecca Pearson, CFP

Rebecca Pearson is the Southeast Regional Director for Dunham, responsible for working with financial advisors to raise assets using Dunham's institutionally-managed mutual funds, Asset Allocation Program, and Dunham Trust's Nevada-based trust services.

Rebecca brings a unique understanding of the challenges experienced by financial advisors. Prior to joining Dunham in 2016, Rebecca worked as a Financial Advisor at SouthTrust Advisors, where she was responsible for creating customized retirement strategies using regulatory and governmental insight to help reduce taxes and enhance benefits. During her tenure, Rebecca worked to educate individuals on their financial options and took a holistic approach in planning

for their retirement, while simplifying processes and growing the firm into a sustainable practice.

While at university Rebecca earned a number of awards, including the Robert C. Byrd Scholarship, a LSU Freshman Merit Award, was a TOPS Honors Scholarship Recipient, and a Regents Scholar.

In her spare time, Rebecca enjoys fishing and doing anything active outdoors.

Rebecca carries a B.A. in Economics and Sociology from Louisiana State University, and is a CERTIFIED FINANCIAL PLANNER™ (CFP®). She holds FINRA Series 7, 63 and 66 registrations.



Ryan Dykmans, CFA

Ryan Dykmans, CFA, is the President and Chief Investment Officer for Dunham. In this capacity, Ryan is responsible for overseeing all aspects of the firm's Analyst team. He heads the Investment Committee and its efforts, including asset allocation design, institutional asset manager oversight and review as well as strategic investment initiatives such as product development.

As a member of the team since 2004, Ryan has served the firm in various roles, most recently as Director of Research prior to being promoted to Chief Investment officer in August 2022. He leads the institutional asset manager selection process, including participation in over 100 manager presentations a year, and provides the firm's financial advisors with thought leadership on issues pertaining to the economy and the financial markets, as well investment

recommendations and strategies.

Ryan's expertise and insights have made him a sought-after voice in the financial industry covering economic trends and the markets as seen on: The Schwab Network, BBC News – Business Today, Market Watch, and other media outlets. Ryan carries a bachelor's degree in Accounting from the University of Redlands and holds FINRA Series 7, 24 and 66 registrations. He has also attained the CFA, Chartered Financial Analyst designation with membership in the CFA Society San Diego and CFA Institute. Ryan lives in San Diego with his wife Nichole and their three children. He is an avid soccer player, coached his son and daughter's soccer teams, and is active in his community.



Salvatore M. Capizzi, CBDA, CEPA

Salvatore M. Capizzi is Chief Sales & Marketing Officer of Dunham. Sal is a seasoned industry veteran with over 30 years of financial services experience. He possesses a wealth of expertise in global sales and distribution leadership, marketing, business development and strategic planning. Sal also has substantial experience establishing startups and reengineering companies. He has consistently demonstrated his ability to develop and implement highly successful sales and marketing plans that have increased assets under management, and has identified and developed distribution channels that have substantially contributed to net income.

Prior to joining Dunham & Associates, Sal served as CEO/Global Wealth Management for Thom-

as Lloyd Group, where he was responsible for establishing sales and distribution in Europe and the Americas. He has also served in executive capacities with New York Life Investment Management, BlackRock Funds, Chase Manhattan Bank, and Shearson Lehman Brothers. At BlackRock, he served as Executive Vice President/ Managing Director and was responsible for the startup and prominent growth of their mutual fund business. He is credited with developing the retail distribution platform there and substantially growing the complex during his eight-year tenure.