



# Wealth Management Group

*INVESTMENTS \* TRUST \* INSURANCE*

*A Division of The American National Bank of Texas*

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Wealth Management - Division Directory

## Management

WMG Main Number: 214-863-6800 / Fax: 214-863-6198

<u>NAME</u>	<u>BRANCH</u>	<u>EXT.</u>	<u>ADDRESS</u>	<u>PHONE NUMBERS</u>
Kathy A. Howe, CRCP / CTFA / AIFA® Executive Vice President Director of Wealth Management	Rockwall WMG Main	6847	1010 W. Ralph Hall Pkwy., Suite 112 Rockwall, TX 75032	214-863-6847 Off 972-951-2053 Cell 214-863-6198 Fax
Cheryl Sutter, Senior Vice President Director of Investments & Advisory	Rockwall WMG Main	6074	1010 W. Ralph Hall Pkwy., Suite 112 Rockwall, TX 75032	214-863-6074 Off 214-557-0245 Cell 214-863-6198 Fax
Robert D. Roten, CFTA. CPA Senior Vice President Director of Trust Services	Trust Fort Worth	8510	2720 West 7 <sup>th</sup> Street, Suite 202 Fort Worth, TX 76107	817-426-8510 Off 817-975-9675 Cell 817-426-8520 Fax

### Investments & Advisory

Cheryl Sutter, SVP Director of Investments & Advisory	Rockwall WMG Main	6074	1010 W. Ralph Hall Pkwy., Suite 112 Rockwall, TX 75032	214-863-6074 Off 214-557-0245 Cell 214-863-6198 Fax
Daniel W. Finch, VP LPL Financial Advisor	Greenville <i>Mon/Wed/Fri</i>	6305	5809 Wesley Street, Greenville, TX 75402	214-863-6305 Off 972-658-2826 Cell 214-863-6184 Fax
Daniel W. Finch, VP Registered Branch Office	Forney <i>Tues/Thurs</i>	6305	401 Pinson Rd., Forney, TX 75126	214-863-6305 Off 972-658-2826 Cell 214-863-5989 Fax
<i>Daniel W. Finch, VP (Rowlett Location By Appointment Only)</i>	Rowlett	6305	5320 Lakeview Parkway, Rowlett, TX 75088	214-863-6305 Off 214-863-6130 Fax
Jennifer George-Smith, VP LPL Financial Advisor	Terrell	6726	102 W. Moore Terrell, TX 75160	214-863-6726 Off 972-989-8136 Cell 214-863-6140 Fax
<i>Jennifer George-Smith, VP (Wills Point Location By Appointment Only)</i>	Wills Point	6726	340 W. North Commerce Wills Point, TX 75169	214-863-6726 Off 972-989-8136 Cell 903-873-4415 Fax
Joseph Logsdon, VP LPL Financial Advisor	McKinney <i>Mon / Fri</i>	6441	2851 S. Central Expressway, McKinney, TX 75070	214-863-6441 Off 214-392-1794 Cell 214-863-6886 Fax
Joseph Logsdon, VP Registered Branch Office	Dallas Central <i>Wed / Thurs</i>	6441	2703 Oak Lawn Ave., Dallas, TX 75219	214-863-6441 Off 214-392-1794 Cell

Joseph Logsdon, VP  
Registered Branch Office

Wylie  
Tues 6441

301 S. Hwy 78,  
Wylie, TX 75098

214-863-6441 Off  
214-392-1794 Cell  
214-863-6120 Fax

*Joseph Logsdon, VP  
(Sachse Location By Appointment Only)*

Sachse  
By Appt 6441

5430 Highway 78  
Sachse, TX 75048

214-863-6441 Off  
214-392-1794 Cell

Jack Tyler, VP, CFP®  
LPL Financial Advisor

Kaufman 5725

2700 S. Washington  
Kaufman TX 75142

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214-676-1366 Cell  
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*Jack Tyler, VP  
LPL Financial Advisor  
(Crandall Location By Appointment Only)*

Crandall  
By Appt 5725

1023 W. Highway 175  
Crandall, TX 75114

214-863-5725 Off  
214-676-1366 Cell  
214-863-6163 Fax

*Jack Tyler, VP  
LPL Financial Advisor  
(Seagoville Location By Appointment Only)*

Seagoville  
By Appt 5725

201 N. Highway 175  
Seagoville, TX 75159

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214-676-1366 Cell  
214-863-6165 Fax

*Jack Tyler, VP  
LPL Financial Advisor  
(Canton Location By Appointment Only)*

Canton  
By Appt 5725

401 E. Highway 243  
Canton, TX 75103

214-863-5725 Off  
214-676-1366 Cell  
214-863-6182 Fax

George Warner, VP, CFP®, CEP®  
LPL Financial Advisor

Rockwall 6526

2865 Ridge Road  
Rockwall, TX 75087

214-863-6526 Off  
214-287-1331 Cell  
214-863-6190 Fax

*George Warner, VP, CFP®, CEP®  
(Royce City Location By Appointment Only)*

Royce City 6526

1231 I-30 East  
Royce City, TX 75189

214-863-6526 Off  
214-287-1331 Cell  
214-863-6190 Fax

Tim Wilson, VP, CFP®, CFS®  
LPL Financial Advisor

Allen 5928

720 S. Greenville Ave.  
Allen, TX 75002

214-863-5928 Off  
214-538-5070 Cell  
214-863-6149 Fax

*Tim Wilson, VP, CFP®, CFS®  
(Plano Location By Appointment Only)*

Plano 5928

1101 E. Plano Pkwy  
Plano TX 75074

214-863-5928 Off  
214-538-5070 Cell  
214-863-6160 Fax

**Investments & Advisory Operations / Customer Service & Compliance**

Kaye Crader Brokerage Operations Manager & Compliance Supervisor	Rockwall WMG Main	6944	1010 W. Ralph Hall Pkwy., Suite 112 Rockwall, TX 75032	214-863-6944 Off 972-816-1484 Cell 214-863-6198 Fax
Mark Blankenship Licensed Administrative Asst II WYLIE/McKINNEY/ALLEN/SACHSE/PLANO	Rockwall WMG Main	5834	1010 W. Ralph Hall Pkwy., Suite 112 Rockwall, TX 75032	214-863-5834 Off 214-392-6312 Cell 214-863-6198 Fax
Sharyl Chappell Licensed Administrative Asst II GREENVILLE/ROWLETT/FORNEY/KAUFMAN CRANDALL/SEAGOVILLE	Rockwall WMG Main	5740	1010 W. Ralph Hall Pkwy., Suite 112 Rockwall, TX 75032	214-863-5740 Off 469-474-8566 Cell 214-863-6198 Fax
Carol McCreanor Licensed Administrative Asst II ROCKWALL/ROYCE CITY	Rockwall WMG Main	6957	1010 W. Ralph Hall Pkwy., Suite 112 Rockwall, TX 75032	214-863-6957 Off 903-348-4713 Cell 214-863-6198 Fax
Missy Wallace Sales Assistant I TERRELL/WILLS POINT	Rockwall WMG Main	6564	1010 W. Ralph Hall Pkwy., Suite 112 Rockwall, TX 75032	214-863-6564 Off 214-385-1170 Cell 214-863-6198 Fax
Kimberly George Executive Assistant / Accounting	Rockwall WMG Main	6535	1010 W. Ralph Hall Pkwy., Suite 112 Rockwall, TX 75032	214-863-6535 Off 214-763-9584 Cell 214-863-6198 Fax

**Traditional Trust**

Kathy A. Howe, CRCP / CTFA / AIFA® Executive Vice President Director of Wealth Management	Rockwall WMG Main	6847	1010 W. Ralph Hall Pkwy., Suite 112 Rockwall, TX 75032	214-863-6847 Off 972-951-2053 Cell 214-863-6198 Fax
Suzan Wooten, VP Trust Officer Trust Administration & Estates	Trust Rockwall WMG Main	6578	1010 Ralph Hall Parkway, Suite 112 Rockwall, TX 75032	214-863-6578 Off 214-863-6198 Fax 214-264-2283 Cell
Lou Johnson, VP, CTFA, CFP® Trust Officer, LPL Financial Advisor	Trust Rockwall WMG Main	6779	1010 Ralph Hall Parkway, Suite 112 Rockwall, TX 75032	214-863-6779 Off 214-863-6198 Fax 903-456-4262 Cell
Vickie Gutierrez, AVP Trust Operations Supervisor	Trust Rockwall WMG Main	6548	1010 Ralph Hall Parkway, Suite 112 Rockwall, TX 75032	214-863-6548 Off 214-863-6198 Fax 214-766-3668 Cell
Ginny McGinty Trust Operations	Trust Rockwall WMG Main	6576	1010 W. Ralph Hall Parkway, Suite 112 Rockwall, TX 75032	214-863-6576 Off 214-863-6198 Fax 469-474-8228 Cell

Margaret Svoboda Trust & Estate Administration Support	Trust Rockwall WMG Main	6800	1010 Ralph Hall Parkway, Suite 112 Rockwall, TX 75032	214-863-6800 Off 214-863-6198 Fax 214-676-8011 Cell
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Diane Hunt Trust Operations	Trust Rockwall WMG Main	6577	1010 Ralph Hall Parkway, Suite 112 Rockwall, TX 75032	214-863-6577 Off 214-863-6198 Fax 214-251-6070 Cell
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**Trust Retirement**

Robert D. Roten, CPA, CTFA SVP, Director of Trust Services	Trust Retirement Ft. Worth	8510	2720 West 7 <sup>th</sup> Street, Suite 202 Fort Worth, TX 76107	817-975-9675 Cell 817-426-8510 Off 817-426-8520 Fax
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Jeff Atwell, AIF®, SVP Business Development Manager Trust Retirement Services	Trust Retirement Ft. Worth	8516	2720 West 7 <sup>th</sup> Street, Suite 202 Fort Worth, TX 76107	817-304-8014 Cell 817-426-8516 Off 817-426-8520 Fax
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Francis "Rob" Borowy, Jr. VP, Trust Officer Employee Benefit Administration	Trust Retirement Ft. Worth	8515	2720 West 7 <sup>th</sup> Street, Suite 202 Fort Worth, TX 76107	469-236-5453 Cell 817-426-8515 Off 817-426-8520 Fax
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David Head, VP Trust Officer Employee Benefit Administration	Trust Retirement Ft. Worth	8517	2720 West 7 <sup>th</sup> Street, Suite 202 Fort Worth, TX 76107	817-781-9991 Cell 817-426-8517 Off 817-426-8520 Fax
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Bonnie Peery Trust Operations	Trust Ft. Worth	8514	2720 West 7 <sup>th</sup> Street, Suite 202 Fort Worth, TX 76107	817-235-1415 Cell 817-426-8514 Off 817-426-8520 Fax
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# Committees

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## Trust Committee

Robert “Bob” Roten, SVP, Committee Chairman  
Riter Hulsey, Chairman of the Board ANB  
John Davidson, EVP  
Robert Messer, EVP CFO  
Steve Booker, EVP COO  
Kathy Howe, EVP Director of Wealth Management  
Suzan Wooten, VP Trust Officer  
Lou Johnson, VP Trust Officer  
Vickie Gutierrez, AVP Trust Operations  
Virginia “Ginny” McGinty

## Trust Investments Sub-Committee

Kathy Howe, EVP Chair  
Cheryl Sutter, SVP  
Lou Johnson, VP Trust Officer  
David Head, VP Trust Officer  
Suzan Wooten, VP Trust Officer – Non-Voting  
Virginia “Ginny” McGinty – Non Voting

## Trust Retirement Committee

Robert “Bob” Roten, SVP, Committee Chairman  
Kathy Howe, EVP  
Robert Messer, EVP, CFO  
John Davidson, EVP  
Steve Booker, EVP, COO  
John Davidson, EVP  
Lou Johnson, VP

## Trust Operations Sub-Committee

Kathy Howe, EVP Chair  
Vickie Guterrez, AVP  
Lou Johnson, VP Trust Officer  
Suzan Wooten, VP Trust Officer  
David Head, VP Trust Officer  
Virginia “Ginny” McGinty – Non Voting

## Non Voting / Advisory

Jeff Atwell SVP  
Barry Cowan, Attorney  
Cheryl Sutter, SVP  
Riter Hulsey, Chairman of the Board