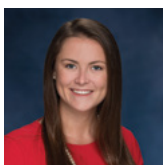




carterfunds.com

# INDEPENDENT BROKER-DEALER (IBD) SALES TEAM

## EXECUTIVE LEADERSHIP



**Gael Ragone**  
President, Carter Funds  
813.310.1604  
[gragone@carterfunds.com](mailto:gragone@carterfunds.com)



**Bill Shea**  
Senior Vice President, National Accounts  
774.297.7955  
[bshea@carterfunds.com](mailto:bshea@carterfunds.com)



**Weldon Evans**  
Executive Vice President  
602.909.7575  
[wevans@carterfunds.com](mailto:wevans@carterfunds.com)

## BUSINESS DEVELOPMENT

## WHOLESALE TEAM

### EXTERNAL



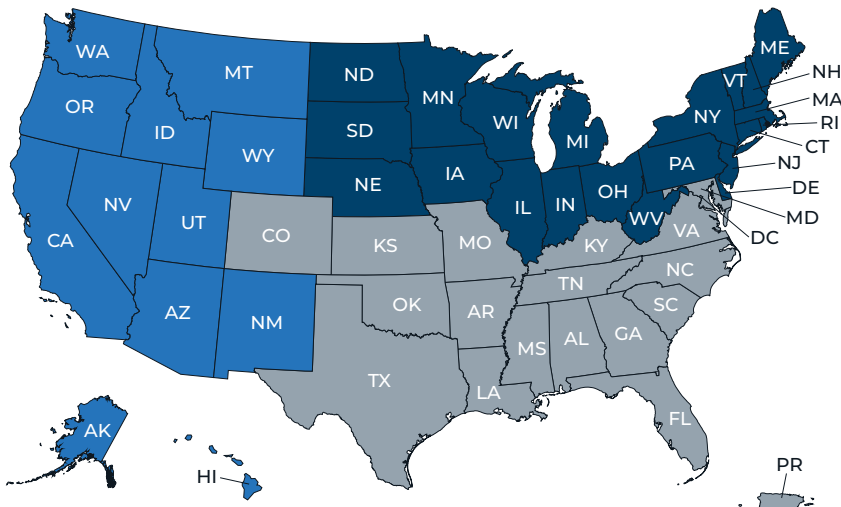
**WEST**  
**Matthew Calabrese**  
Senior Vice President  
714.454.9230  
[mcalabrese@carterfunds.com](mailto:mcalabrese@carterfunds.com)



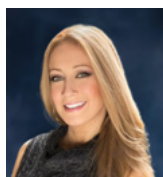
**SOUTH**  
**Weldon Evans**  
National Sales Director  
602.909.7575  
[wevans@carterfunds.com](mailto:wevans@carterfunds.com)



**NORTH**  
**Chris Hines**  
Senior Vice President  
508.207.3780  
[chines@carterfunds.com](mailto:chines@carterfunds.com)



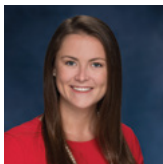
### INTERNAL



**WEST SOUTH NORTH**  
**Stacey Roth**  
Senior Vice President, Internal Sales Director  
973.919.9297  
[sroth@carterfunds.com](mailto:sroth@carterfunds.com)

# RIA & FAMILY OFFICE SALES TEAM

## EXECUTIVE LEADERSHIP

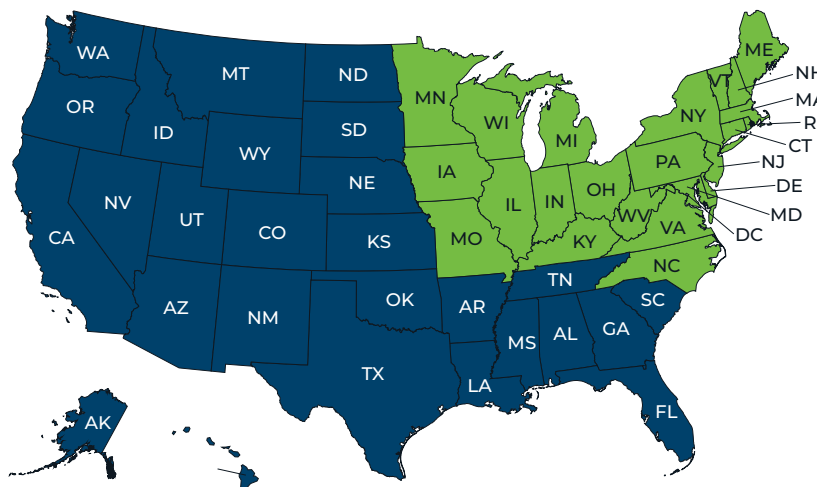


**GAEL RAGONE**  
President, Carter Funds  
813.310.1604  
[gragone@carterfunds.com](mailto:gragone@carterfunds.com)

## BUSINESS DEVELOPMENT



**BILL SHEA**  
Senior Vice President, National Accounts  
774.297.7955  
[bshea@carterfunds.com](mailto:bshea@carterfunds.com)



### WEST/SOUTHEAST

#### EXTERNAL



**JIM BULLOCK, CFS**  
Senior Vice President,  
National Director of RIA & FO Sales  
Office & Text: 720.954.2337  
Cell (voice only): 303.656.3522  
[jbullock@carterfunds.com](mailto:jbullock@carterfunds.com)

#### INTERNAL



**ROB CARTER**  
Vice President,  
Internal Sales Director  
Office & Text: 813.708.8371  
Cell (voice only): 813.420.8950  
[rcarter@carterfunds.com](mailto:rcarter@carterfunds.com)

### GREAT LAKES/NORTHEAST

#### EXTERNAL



**MICHAEL MCDONOUGH, CAIA**  
Senior Vice President,  
RIA & FO Sales  
Office & Text: 919.749.4038  
Cell (voice only): 919.432.4356  
[mmcdonough@carterfunds.com](mailto:mmcdonough@carterfunds.com)

#### INTERNAL



**ROB CARTER**  
Vice President,  
Internal Sales Director  
Office & Text: 813.708.8371  
Cell (voice only): 813.420.8950  
[rcarter@carterfunds.com](mailto:rcarter@carterfunds.com)