meet the team
the Syracuse branch

For more information, ask to speak to a member of the team:

AXA Advisors, LLC
120 Madison Street, Suite 1900
Syracuse, NY 13202

tel: (315) 425-6300
fax: (315) 425-6360

Visit our website at:
http://www.syracuse.axa-advisors.com/

At the Syracuse Branch of AXA Advisors, LLC, our mission is to provide superior advice and service to our clients in our respected communities while presenting AXA Equitable with the highest level of integrity. We have financial professionals who focus on helping individuals meet a variety of financial needs, including Retirement Planning, Asset Allocation, Estate Planning, Qualified Plan funding, Non-Qualified Deferred Compensation and Business Continuation.

Joseph A. DiMora, CLU
Executive Vice President

(315) 425-6300
Joseph.Dimora@AXA-Advisors.com

Lynn Luteran-Minney
Branch Operations Manager

(315) 425-6303
Lynn.Luteran-Minney@AXA-Advisors.com

S. Anthony Lenkiewicz
Branch Controls Manager

(315) 425-6312
Anthony.Lenkiewicz@AXA-Advisors.com

• Supervise Branch Team
• Branch Communications w/FP’s
• Operations Management
• Human Resources/Facilities Management
• Resolve commission issues/compensation inquires
• Administer Core/Span Program
• Validation, Benefit & Commission Appeals
• Technology Issues
• Process Associates terminations
• New Hire paperwork

• Compliance Supervision for Branch
• Incoming correspondence review
• Mitigate risk for FP’s / Branch
• Visit FP’s for Business Practice Consultation
• Administration of Firm Element Program
• Annual Reviews with Advisors
• Manage Replacement Process
• Seminar / Advertising Approval
MEET THE TEAM
The Syracuse Branch

Management Team

Alexander P. Henn
Vice President
(315) 425-6320
Alexander.Henn@AXA-Advisors.com

- Financial Professional Recruiting
- DSF Development
- DSF Coaching
- Joint-case work with DSF
- Develop AXA Brand in the Greater Syracuse Area

Steven DeRiancho, CFP®
Vice President
Southern Tier District
(607) 763-1430
Steven.Deriancho@AXA-Advisors.com

- Financial Professional Recruiting
- DSF Development
- DSF Coaching
- Joint-case work with DSF
- Develop AXA Brand in the Southern Tier Area

Gregory A. Ronneburger, CFP®
Vice President & Director of RBG
(315) 425-6334
Gregory.Ronneburger@AXA-Advisors.com

- Financial Professional Recruiting
- RBG Development
- RBG Coaching
- Joint-case work with RGB
- Develop AXA Brand in the Greater Syracuse Area
MEET THE TEAM
The Syracuse Branch

**Branch Staff**

**Jackie Boskovski**
*Administrative Assistant*
(315) 425-6305
Jacqueline.Boskovski@axa-advisors.com

- Provide Administrative Support to VPs
- Follow up on service request with service centers
- Assist with general branch support
- Provide back up phone coverage for receptionist

**R. Andrew Hagen,**
*CFP®, Branch Training Manager*
(315) 425-6344
Andrew.Hagen@AXA-Advisors.com

- Branch Training Coordination
- Design and Deliver Training curriculum for DSF monthly training meetings and quarterly Branch Meetings
- Facilitate Quarterly DSF Study Group Meetings
- Resource to DSF for case consultation, case design and technical support

**Stephanie Joncas**
*Executive Assistant to EVP*
(315) 425-6301
Stephanie.Joncas@AXA-Advisors.com

- Administrative duties as assigned by EVP
- Plan & coordinate Branch meetings & events
- Coordinate Branch Calendar, Weekly Activity Reports - EVP & Assoc.
- Spending / Marketing account maintenance
- Branch Monthly Newsletter
- Branch Website Maintenance

**Stephanie J. Ruffo**
*Client Relations Manager*
(315) 425-6326
Stephanie.Ruffo@AXA-Advisors.com

- Create, Develop & Manage Orphan Leads
- Assign & Track all Branch Leads
- Handle Clients of Terminating Associates
- Train on Product Knowledge
- Point Person for: ClientLink, E*Relationship, Webstation, Mining for Diamonds
- Client Assignment System / Report Analytics
- Client Services
MEET THE TEAM
The Syracuse Branch

Branch Staff - Continued

Ann Smith
Administrative Assistant

(607) 763-1400
Anna.Smith@AXA-Advisors.com

- Answer and direct incoming phone calls
- Greet clients and visitors
- Order office supplies
- Maintain office and computer equipment
- Maintain compliance information
- Daily operational issues for the office
- Process new hire information
- Maintain application updates
- Assist with Onboarding of new Associates
- Provide support to District VP, Assistant VP, Client Relations Manager and Associates as needed

JoAnn Thornton
Administrative Assistant/Receptionist

(315) 425-6346
Joann.Thornton@AXA-Advisors.com

- Greet clients and visitors
- Order office supplies
- Answer and direct incoming phone calls
- Maintain office and computer equipment
- Maintain compliance information
- Daily operational issues for the office
- Assist BOM and CRM with projects
- Provide general office assistance in the Syracuse office

Kelly A. Watson
Branch Licensing Coordinator

(315) 425-6379
Kelly.Watson@AXA-Advisors.com

- Facilitate FP Licensing, including reimbursements
- LARS Administrator
- License and Appointment Renewals
- STC for L&H and Securities Training
- Train New FP’s on office process
- Recruiting for District Manager
- District Assistant and VP support
- Assist with Onboarding of New Associates

Andrew W. Whalen,
ChFC, CLU
Branch Asset Manager

(315) 425-6391
Andrew.Whalen@AXA-Advisors.com

- Facilitate the sales of investment products in the Branch
- Develop and teach Broker/Dealer product information
- Deliver Market Research
- Support Branch Marketing
- Joint Case work with advisors
- Assist with DSF & ESF Development