



First Ascent Asset Management

# WHO YOU GONNA CALL?

Are you wondering who to call at First Ascent with a question or a request for help? This quick-response guide will help.

## Advisor Consulting Team

For questions about the portfolios we offer, the services we provide, or how to work with us, contact our Advisor Consulting Team at:

[advisorconsulting@firstascentam.com](mailto:advisorconsulting@firstascentam.com)  
720-465-7888



**Mac MacKillop**  
DIRECTOR OF ADVISOR CONSULTING

## Client Service Team

For questions about a specific account or household, or trading, billing, or account maintenance, contact our Client Service Team at:

[clientservice@firstascentam.com](mailto:clientservice@firstascentam.com)  
720-465-7888



**Travis Nelson**  
DIRECTOR OF CLIENT SERVICE &  
OPERATIONS



**Marisa Viterbo**  
ADVISOR CONSULTANT



**Natalie Dilley**  
INVESTMENT OPERATIONS ASSOCIATE

## The Details

Here's more about the inquiries handled by the Advisor Consulting and Client Service Teams:

### **Advisor Consulting Team**

- Request a demo of our Account Onboarder
- Arrange for a Portfolio Diagnostics report
- White labeling of FAAM marketing materials
- Investment process or model portfolios
- Getting a log-in to our Advisor Portal
- Questions about pricing of our services
- Help finding things on our website

### **Client Service Team**

- Trading of specific accounts
- Time-sensitive account matters
- Questions about specific accounts
- Funding status of accounts
- Contributions and withdrawals
- Billing questions about specific accounts
- Status of accounts in transfer