CN

Corey Norman, CFP®

FINANCIAL ADVISOR

MSF Advisors | MarketShare Financial

CFP® Series 7 Series 66 Series 24

ABOUT

Corey began his career with MarketShare Financial in January 2011, bringing extensive experience in marketing, sales development, and advisor relations to every client engagement. A dedicated advocate for those he serves, Corey puts client goals and objectives at the center of everything he does — working diligently to ensure the right processes are in place to move things forward.

In 2019, Corey earned his CERTIFIED FINANCIAL PLANNER™ (CFP®) designation, deepening his ability to deliver comprehensive guidance on investments, insurance, and holistic financial planning. He has built a reputation for translating complex financial concepts into clear, actionable strategies that empower clients to pursue their goals with confidence.

CREDENTIALS & EDUCATION

CERTIFIED FINANCIAL PLANNER™ (CFP®)

Earned 2019

B.S., Economics

Butler University, College of Business Administration

Licenses

Series 7 • Series 66 • Series 24

Indiana State Life & Health

CONTACT

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11611 N. Meridian Street, Suite 300

Carmel, IN 46032

AREAS OF FOCUS

- Investment Planning
- Retirement Strategies
- Insurance Solutions
- Financial Planning
- Advisor Development

Maynard M. Azose

PARTNER & FINANCIAL ADVISOR

Azose Johnson & Associates | MarketShare Financial

Partner | Series 66 | IAR

ABOUT

Born and raised in Seattle, Maynard launched his financial services career after graduating from The Ohio State University in 2012. His early experience spans Edward Jones — where he served individual investors and small-business owners — and Waddell & Reed Financial, building a well-rounded foundation in client advisory and portfolio management.

In 2020, Maynard stepped into a leadership role at Azose Johnson & Associates, assuming co-ownership alongside Amanda K. Johnson following the retirement of firm founder Jill A. Ruser. Today, as Partner and Financial Advisor, he brings a genuine passion for developing customized financial plans and crafting investment strategies tailored to each client's unique goals.

EDUCATION & BACKGROUND

B.A., The Ohio State University

Graduated 2012

Previous Roles

Financial Advisor — Waddell & Reed Financial
Financial Advisor — Edward Jones
Partner & Co-Owner — Azose Johnson & Associates (2020–present)

License

Series 66 • Investment Advisor Representative
Registered: CA, CO, GA, ID, MT, OH, SD, TX, VA, WA

CONTACT

PHONE (509) 822-4363
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528 E. Spokane Falls Blvd, Suite 303
Spokane, WA 99202

AREAS OF FOCUS

- Financial Planning
- Investment Management
- Retirement Strategies
- Estate Planning
- Educational Funding
- Social Security Analysis

Matthew L. Montgomery, ChFC

FINANCIAL ADVISOR & OWNER

Montgomery Financial Designs | MarketShare Financial

ChFC | RIA | Series 63 | 37+ Years

ABOUT

With more than 37 years of experience in financial services, Matthew Montgomery has built his practice around one straightforward conviction: clients deserve a highly personalized, partnership-driven approach to their financial lives. As a Chartered Financial Consultant (ChFC) and Registered Investment Advisor, Matt founded Montgomery Financial Designs in Jacksonville, Texas, serving a diverse clientele that spans entrepreneurs, peak-career professionals, pre-retirees, retirees, and high-net-worth individuals.

Matt's philosophy centers on open communication and long-term relationships. He builds individualized financial models — assessing risk tolerance, identifying blind spots, setting clear goals, and implementing disciplined strategies — so that clients can relax and stop worrying about their money. His investment approach emphasizes diversification and capital preservation alongside growth, adapting to changing market conditions.

CREDENTIALS & EDUCATION

Chartered Financial Consultant (ChFC)

The American College of Financial Services

Texas A&M University

Bachelor's Degree

Licenses & Registration

Series 63 • Registered Investment Advisor

Insurance Broker / Agent

Registered in Texas; additional states under applicable exemptions

CONTACT

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1504 East Rusk Street
Jacksonville, TX 75766

Client Profiles Served

Entrepreneurs • Peak-Career Professionals

Pre-Retirees & Retirees • High-Net-Worth Individuals

Families • Small Business Owners

AREAS OF FOCUS

- Wealth Management
- Retirement Solutions
- Portfolio Construction & Risk Mgmt
- Estate Strategies
- Financial Planning Models
- Small Business Planning

JG

Jonathan W. Greenwich

FOUNDER & MANAGING EXECUTIVE

Virtus Capital | MarketShare Financial

Series 7 | Series 66 | IAR | 20+ Years

ABOUT

Jonathan Greenwich is the Founder and Managing Executive of Virtus Capital, a private wealth management firm serving individuals, entrepreneurs, and businesses in the Washington, D.C. metropolitan area. With nearly two decades of entrepreneurial experience and more than 30 years building deep personal and professional networks across all industries, Jon brings a rare combination of business acumen, financial expertise, and an athlete's competitive drive to every client relationship.

Jon leads a team with a combined experience of more than 50 years in financial services, ensuring every Virtus Capital client receives individualized attention and a best-in-class service experience. A former Division I athlete and coach, he applies the lessons of peak performance to his financial practice — believing the best outcomes are achieved when all efforts are aligned in a single direction.

> *"At the very core of our mission, we help investors answer two of their most fundamental questions: What should I be investing in and will I reach my financial goals? We have the tools and expertise to get you those answers."*

CREDENTIALS & EDUCATION

M.S., Finance
Georgetown University

B.S., University of Maryland
College Park

Licenses
Series 7 • Series 66
Investment Advisor Representative (IAR)
Insurance Licensed — Virginia

Board Membership
FuturePlan Key Advisor Board (Acensus)

CONTACT

PHONE (703) 635-4172
WEB virtuscap.com

215 N. Payne Street
Arlington, VA 22314

Prior Experience
Investment Advisor Representative — Royal Alliance Associates
Financial Advisor — MassMutual Greater Washington
Registered Representative — Capital Financial Group, Reston, VA

AREAS OF FOCUS

- Wealth Management
- Financial Planning
- Estate Planning
- Entrepreneurs & Owners
- Employee Benefits
- Business Exit Planning
- Tax-Efficient Investing
- Corporate Asset Management

Conner McCubbin

FINANCIAL ADVISOR

Guida & McCubbin Financial Consultants | MarketShare Financial

Series 7 | Series 66 | IAR | MBA

ABOUT

Conner McCubbin is a dynamic financial advisor and Co-Managing Partner at Guida & McCubbin Financial Consultants in Henderson, Nevada. A proud Las Vegas local and honors graduate of the University of Nevada, Las Vegas, Conner brings a unique academic foundation — combining an MBA in Finance with a B.S. in Mechanical Engineering — to every client engagement. With over five years of experience in financial services, he has established himself as a trusted partner to individuals, young professionals, and business owners across more than 15 states.

Conner specializes in serving young professionals and business owners at every stage of their financial journey — from recent college graduates taking their first investment steps, to seasoned entrepreneurs planning for long-term growth. His investment philosophy centers on personalized service and individualized strategies. Passionate about giving back, Conner established the McCubbin HSC Leadership Scholarship at UNLV at just 30 years of age, and continues to mentor students and young professionals in his community.

CREDENTIALS & EDUCATION

MBA in Finance

University of Nevada, Las Vegas

B.S., Mechanical Engineering

Honors College, UNLV — Minors in Biology & Mathematics

Licenses

Series 7 • Series 66
Nevada Insurance License
Registered in 18 U.S. states and territories

Prior Experience

Investment Advisor & Representative — John Hancock
Executive Assistant — Farmers Insurance

CONTACT

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WEB gm-fc.com

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Henderson, NV 89074

Community & Philanthropy

Founder, McCubbin HSC Leadership Scholarship (UNLV)
Honors Alumni Board Member, UNLV
Mentor — Students & Young Professionals

AREAS OF FOCUS

Wealth Management | 401(k) Plan Services | Young Professionals | Investment Planning | Business Owner Planning | Retirement Strategies | Insurance Solutions | Financial Planning