The Center for Investment and Wealth Management operates under the guidance and direction of its eight active planning committees. These committees offer excellent resources for the Center members, students and the business community, and the unique opportunity to collaborate and network among committee members. We encourage participation wherever you have a passion.

**Executive Committee**
- Shawnette Gauer (Current Co-Chair) – Schwab Advisor Services
- Feroz Ansari – Compak Asset Management
- Victoria Collins – Your Legacy Project
- Kara Duckworth, CFP® (Current Co-Chair) – Mercer Advisors
- Mark Moehlman – Beacon Pointe Wealth Advisors
- Laine Ainsworth – Beacon Pointe Wealth Advisors
- Laurie Dubchansky, CFP® – Havaplan Financial
- David Karachuk – LPL Financial LLC
- Gregory Lai - Affinity Investment Advisors
- Jerry Braakman, First American Trust
- Shiry Tannenbaum - Tannenbaum Law

**Membership Committee**
- Gregory Lai (Current Chairperson) - Affinity Investment Advisors

**Endowment Committee**
- Mark Moehlman (Current Co-Chair) - Beacon Pointe Wealth Advisors
- Kara Duckworth (Current Co-Chair), CFP® – Mercer Advisors

**Programs**
- David Karachuk (Current Chairperson) – LPL Financial LLC
- Laine Ainsworth (Chair-emeritus) – Beacon Pointe Wealth Advisors
- Jerry Braakman - First American
- Angela Dailey - WISE
- Laurie Dubchansky – Havaplan Financial
- Robert Forrester - Alliance Bernstein
- Greg Lai - Affinity Investment Advisors
- Jennifer Povlitz - UBS
- Mark Prendergast - Inspired Financial
- Evelyn Zohlen - Inspired Financial

**Pacific Life LIFEvest Financial Literacy Program and Alumni Relations Committee**
- Kara Duckworth (Current Chairperson) - Mercer Advisors
- Laurie Dubchansky – Havaplan Financial
- Chad Bollenbach – Canterbury Consulting
- Stuart Blair – Canterbury Consulting
- Feroz Ansari – Compak Asset Management
- Wendy Chen – CIBC
- Chris Lum - PAAMCO Prisma
- Hyun Swanson - UCOP
- Tere Segarra - Pacific Life
- Tennyson Oyler - Pacific Life
- Ashley Bleckner - Ellevest
- Kevin Wiest - Windes
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"Investments, Financial Planning and You" Committee

- Feroz Ansari (Current Chairperson) – Compak Asset Management
- Glenn Hamburger – Banc of California
- Ashley Bleckner – Ellevest
- Chris Lum - PAAMCO Prisma
- Cyrus Charna - Bank of the West
- Dan Melehan - Alliance Bernstein

Women’s Financial Wellness Initiative Committee

- Shiry Tannenbaum (Current Co-Chair) – Tannenbaum Law
- Ashley Bleckner - Ellevest
- Victoria Collins, PhD - Your Legacy Project

UCI Student Engagement Committee

- Jerry Braakman (Current Chairperson) - First American Trust
- Kevin Jack - Mercer Advisors
- Shawnette Gauer - Schwab Advisor Services
- Matt Kimmel - Farmers and Merchants
- Glenn Hamburger - Banc of CA