

# Board Committees

The Center for Investment and Wealth Management operates under the guidance and direction of its ten 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
- Jordan Floriani, CFA

## 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

## UCI Student Engagement Committee

- Jerry Braakman (Current Chairperson) - First American Trust

## Professional Development Programs and Community Programs Committee

- David Karachuk (Current Chairperson) – LPL Financial LLC
- Laine Ainsworth (Chair-emeritus) – Beacon Pointe Wealth Advisors

## Charles Schwab Trading Lab Committee/Undergraduate Course

- Robert Forrester (Current Chairperson) – Alliance Bernstein
- Feroz Ansari – Compak Asset Management
- Jerry Braakman – First American Trust

## Pacific Life LIFEvest Financial Literacy Program and Alumni Relations Committee

- Laurie Dubchansky (Current Chairperson) – Havaplan Financial
- Chad Bollenbach – Canterbury Consulting
- Stuart Blair – Canterbury Consulting
- Feroz Ansari – Compak Asset Management
- Jordan Floriani, CFA
- Wendy Chen – CIBC
- Chris Lum - PAAMCO
- Hyun Swanson - UCOP
- Tere Segarra - Pacific Life
- Tennyson Oyler - Pacific Life
- Ashley Bleckner - RS Crum
- Kristen McEneaney – PAAMCO

Center for Investment and Wealth Management

**"Investments, Financial Planning and You"  
Committee**

- Feroz Ansari (Current Chairperson) –  
Compak Asset Management
- Glenn Hamburger – Banc of California
- Ashley Bleckner – RS Crum
- Chris Lum - PAAMCO
- Cyrus Charna - Bank of the West

**Women's Financial Wellness Initiative  
Committee**

- Shiry Tannenbaum (Current Co-Chair) –  
Tannenbaum Law
- Jordan Floriani (Current Co-Chair), CFA
- Victoria Collins, PhD - Your Legacy  
Project