Client Care Team

HORIZON FINANCIAL SERVICES, LLC

Angel Moorefield

Paraplanner

angel.moorefield@horizonfs.com, ext. 118

Contact Angel with questions about your financial plan or to share important life changes that may impact your risk score. Angel can also assist you with eMoney, account questions, and other planning-related needs.

Katie Johnson

Receptionist & Administrative Assistant

katie.johnson@horizonfs.com, ext. 100

Contact Katie to schedule an appointment or share updated contact information. Katie can also assist you with DocuSign paperwork packages and general questions or she will direct you to the correct team member for your support needs.

Dawn Rutledge

Director of Client Services

dawn.rutledge@horizonfs.com, ext. 111

Contact Dawn with questions about your brokerage account paperwork. She can also assist you with deposits, transfers, systematic withdrawals, charitable donations, and Required Minimum Distributions (RMDs).

Leslie Blankenship

Accounting & Back Office Support Specialist

leslie.blankenship@horizonfs.com, ext. 106

Leslie can help you establish credentials for Account Access, our client portal through Finfolio. She also sends updated asset allocations to clients with assets under advisement and performs other back office support functions.

Ashley Parrish

Assistant Director of Client Services

ashley.parrish@horizonfs.com, ext. 102

Contact Ashley to request funds from your brokerage account. Ashley also processes annuity applications, coordinates withdrawal and reallocation requests, and provides general client support for securities accounts.

Jessica Patterson

Marketing & Business Development Manager

jessica.patterson@horizonfs.com

Contact Jessica if you'd like to receive information about our special events. She also manages our client messaging, ensuring you stay "in the know" with our newsletters & other email communications.

Not sure who to contact? Send an email to **clientcare@horizonfs.com** and we'll take care of the rest. Please visit our website for a complete list of our client support and operations team.

For after hours support, please contact Charles Schwab & Co., Inc. (Schwab) at 1-800-435-4000. You can also use Schwab's client portal, Schwab Alliance, to access your account online. To reset your Schwab Alliance password through their automated system, call 1-800-780-2755.

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