



TIAA-CREF's Mongin Jumps To Wells

Michael Mongin, a wealth management advisor for TIAA-CREF, has joined **Wells Fargo Private Bank** in Orlando, Fla. In the role, Mongin is responsible for developing a comprehensive wealth plan based on clients' and families' financial goals such as cash flow, risk/liability management, alternative investment guidance, special needs or elder family planning, and closely held business advice on issues of valuation, sale, and transfer.

Mongin reports to **Rick Simonetti**, senior director of planning, based in Tampa, and **John Pisan**, regional director for Orlando. Simonetti noted that Mongin was attracted to Wells because of its strictly advisory platform along with the firm's brand name and track record over the last few years.

The search was conducted by **Gary Teigman** and **David Glaser** of **ECG Resources**. (PAM Private Asset Management www.pammagazine.com)