Nora Wells, QKA Director of Operations

Nora is the Director of Operations for our team and an integral part of our team’s continued growth. She joined the team in 2011 after 13 years of Portfolio Administration and Operations Management at Alex Brown & Sons, as well as 5 years of Compliance Supervision at T. Rowe Price Associates. Nora graduated from the College of Notre Dame of Maryland with a BA in Business Administration and Accounting. She is also a credentialed member of the American Society of Pension Professionals and Actuaries.

Nora loves the opportunity to work directly with both our business owner and individual clients to ensure that our team continues to have a great relationship with them. She focuses on creating the best client experience through compassionate, timely and efficient coordination of services for our clients and team members. Additionally, she coordinates the entire office, continuously improving our team’s process and efficiency.

Robyn D. Roth, CLU Client Relationship Manager

Robyn is a Client Relationship Manager for our team. By listening, Robyn is able to build strong relationships with clients built on their values, concerns, and ultimate goals. She finds passion in seeking to understand more about our clients to ensure that they have the best experience in working with our team throughout the process. Robyn began her career as a Financial Adviser in 1994 with First Financial Group in Towson, MD. She continued her career with The Hartford as a point of sale expert for life insurance and in 2006 joined Mezrah Consulting. Robyn’s new role as Client Relationship Manager allows her to leverage her many years of experience and diverse industry background to help our clients throughout the financial planning process

Robyn received a Bachelor of Science in Economics from Mount Saint Mary’s University. She continued to earn her Master’s Degree in Business Administration from Wilmington College. In 2002, she earned the Chartered Life Under-Writer---. Robyn is an active mentor in the Sister Circle program in the Baltimore area. Her focus is on helping clients achieve their financial goals both now and in the future.

Patrick Ryan, CFP Financial Advisor

Patrick is a CERTIFIED FINANCIAL PLANNER and a Financial Adviser on our team and is motivated by the opportunity to change people’s lives through financial education. He has worked in the industry for 5 years focusing on helping clients understand the various financial risks they have in their lives. He joined our team in 2016 which provided him the opportunity to help clients reach their saving, retirement, and financial goals but also addresses the risk in their lives through the financial planning process.

Patrick is from Baltimore area and a graduate of Loyola Blakefield High School in Towson, MD. He continued his education at Florida State University where he graduated with a Bachelor’s Degree in Political Science & International Affairs. He was a member of the Men’s Lacrosse Team. He sits on the board of the Christian Service Committee and is actively involved in Loyola High School’s Alumni Program. In 2016 Patrick was a Maryland’s Finest honoree for the Cystic Fibrosis Foundation of Maryland.

Tadao Okamoto

Tadao Okamoto is a Financial Services Associate at Sortino Financial Group. Having interned in the office in 2012, Ted rejoined the team in 2016. He now works directly with a team of financial planners where he internally assists them doing product research and client data review.

Ted originally is from the suburbs of New York City, went to boarding school at Pomfret High School in Connecticut where he was the varsity football captain. He attended Bates College in Maine receiving his Bachelor of Arts in Economics. Ted loves watching football, playing basketball and attempts to play golf when he has the chance.

Rosea Jones

Rosea Jones is our New Business Processor and works directly with Nora Wells (Director of Operations). She joined our team in late 2017 after working in a Medical Center as an Administrator in Customer Relations for 7 years. Rosea loves working in a team environment that is designed to help clients address their financial concerns while providing the highest quality service.

Currently, Rosea is studying to receive her Maryland licensing in Life and Health Insurance. After which, she will move on to accomplishing her licensing in securities. Rosea is compassionate, helpful, and alongside Nora, committed to making sure that the clients’ needs as well as the team’s needs are met.

Rosea lives with her son and dog who both bring joy to her life. In her spare time Rosea enjoys sewing, socializing with her book club members, and taking walks with her dog Layla.

Insert Rosea Jones Bio

Paul A. Sortino, CFP—[-- CEO/Financial Adviser

Paul is our team’s President, CEO and an actively practicing CERTIFIED FINANCIAL PLANNER--- professional. He finds his most important responsibility is to provide education; helping clients, individuals, business owners and other advisors to understand the advantages and disadvantages of the various financial planning strategies that are available. He collaborates with clients, their other advisers, and our team throughout the financial planning process to ensure the most appropriate plan design is chosen, and he continues to coordinate with our team to ensure the design is maintained and adjusted as our clients businesses and lives change. In addition to working with our individual and business clients he focuses on guiding the overall success of our team’s working relationship with our partners and clients.

Paul has been working in the financial services industry since 2006 and enjoys the opportunity that the career provides him to assist others. Paul graduated from Calvert Hall College High School and continued to University of Maryland’s Robert H. Smith School of Business, earning a Bachelor of Science in Accounting. In 2010, he earned the CERTIFIED FINANCIAL PLANNER--- designation. He serves on the board of the Maryland Chapter of the Cystic Fibrosis Foundation and is active in the Multiple Sclerosis Society.

James H. Foster. Jr. CPA Director of Marketing/ Financial Advisor

Jim coordinates our team’s CPA, accountant, and advisor partnership program in addition to being a Financial Adviser. From 1983 through 1995, he worked as a CPA running his own accounting practice. He changed his career path and entered the financial services industry in 1996. His experience in the tax field gives him a unique perspective when working with our business partners to structure the most effective working relationship for their practice and clients. Jim thrives in his involvement throughout planning process, working with our team, our partners, and our clients to ensure the optimal client experience. He enjoys the opportunity this gives him to make a difference in their lives.

Jim graduated from the University of Maryland’s Robert H. Smith School of Business with a Bachelor of Science in Accounting and moved on to earn his Certified Public Accountant designation in 1983.

A Michael Bentley Kelen CFA, CFP-- Director of Financial Services

Michael is our Director of Financial Services and has been a member of the team since 2011. He started his career as a Financial Adviser and has shifted his role to align with his true passion of financial plan construction, research, and investment portfolio management. Michael utilizes his knowledge, expertise, and unique analytical ability to develop a range of financial strategies, custom designed portfolios, and ultimately the most effective overall plan for our clients.

Michael is CFA Charterholder as well as a CERTIFEID FINANCIAL PLANNER--- professional. He graduated from St. Paul’s school and received a Bachelor of Science in Economics from Bates College, Lewison, ME. In an ever changing industry, Michael is focused on keeping our clients, partners, and team’s advisers informed about their investments, plans, and ensuring that we are providing the most up to date financial strategies.

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