Meet The Planning Team

APELLA
Advice for Life

Jason Gentile, CFP® | Director of Financial Planning, Senior Financial Advisor | jgentile@apellawealth.com | 860.682.5972

Jason Gentile is the Director of Financial Planning for Apella Wealth and a Certified Financial Planner. Over the last 20 years he has spent most of his time helping people reimagine their financial futures. In his time in this industry, he has watched too many individuals struggle with the complexity of planning and investing. His time is spent trying to simplify complex financial challenges, unclutter people's financial lives and provide a clear path to achieving goals that may seem out of reach. He wants to answer the only question that matters – "am I going to be ok." When Jason is not at work he mostly chauffeurs his children to various sporting events, complains about the Red Sox and pretends that this is the year he gets in shape.

Matt Gallagher | Manager of Financial Planning
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As Manager of Financial Planning, Matt leads Apella's team of paraplanners to assist financial advisors in creating thorough, comprehensive financial plans. Matt is also responsible for maintaining efficient planning processes, integrating new planning technologies into existing technology stack, and serves as a resource for advanced case consultation. Matt initially joined Apella Wealth in 2019 as a Portfolio Analyst and Paraplanner. Prior to Apella, he worked at Northwestern Mutual as a financial advisor specializing in life and disability insurance from 2017-2019.

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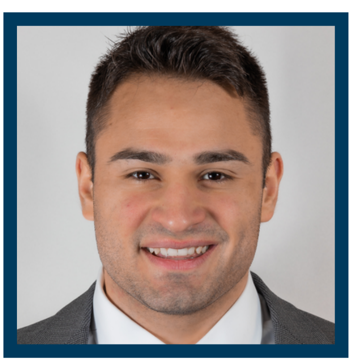

Joseph Ferreira | Paraplanner
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Joseph Ferreira joined Apella Wealth in January of 2023 as a Paraplanner. Joseph works with financial advisors, along with their clients, to create and implement comprehensive financial plans to help ensure their long-term financial goals. Prior to Apella, Joseph was an intern within the Private Wealth Management division at Morgan Stanley and a student at Union College. Joseph graduated from Union with Cum Laude Honors as well as Departmental Honors in his major of Economics. While at Union, Joseph was a member of their football team, in which he became one of six student-athletes throughout Union's history to earn three College Sports Communicators Academic All-District Honors for outstanding work in the classroom and on the field.

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Raylynn Branes | Paraplanner
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Raylynn Branes joined Apella Wealth in 2022 as a Paraplanner after graduating from The Douglas Honors College at Central Washington University in 2019. She was one of the first students in the nation to graduate from a university offering a degree in Financial Planning. Now living in Bellevue, Raylynn works alongside Apella Wealth Advisors with a focus on building comprehensive financial plans for clients with attention to tax, retirement, estate, and college planning to help them achieve their goals.

Kramer Croisant | Paraplanner
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Kramer Croisant began his career working for a few CPA firms preparing tax returns for individuals and small businesses. But his true passion lies in working with people to make smart financial decisions. Thus, why he made the decision to transition to the financial planning profession. Kramer graduated with honors from Western Oregon University with a Bachelor of Science degree in business with a focus in accounting. Kramer his wife and son Jack live in beautiful central Oregon. Kramer's wife Cameron is a 1st grade teacher at a local elementary school. Outside of the office Kramer serves as the baseball coach for a local high school. When time permits you can find Kramer fly fishing or golfing around central Oregon.

Davis Calandra | Paraplanner
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Davis Calandra works as a paraplanner for Jason Gentile's team. He is a recent graduate Kennesaw State University where he obtained a degree in Sports Management. Davis began as in intern for Apella in 2020 at the Atlanta Office. Davis has a passion for learning and growing in this industry and hopes to one day be a Financial Advisor, just like his father, and help people achieve their financial goals. In his spare time, Davis enjoys going to Braves Baseball games with his father and twin brother.