Meet The 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.

Shawn O'Sullivan | Financial Advisor
sosullivan@apellawealth.com
Since 2017, Shawn O'Sullivan has been working with Apella Wealth's clients to help them achieve their long-term goals. In his role as Financial Advisor, Mr. O'Sullivan utilizes his experience, as well as Apella's deep bench of resources to bring a high level of service and expertise to our clients. Additionally, Mr. O'Sullivan oversees Apella's Portfolio Analyst Team and is a member of the firm's investment committee. Prior to becoming a Financial Advisor, Mr. O'Sullivan held roles in client service, portfolio management and operations leadership. Mr. O'Sullivan graduated from the University of Connecticut with a major in Economics and currently resides in Cheshire, CT.

Matt Gallagher | Manager of Financial Planning
mgallagher@apellawealth.com
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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Apella Capital, LLC DBA Apella Wealth is an investment advisory firm registered with the Securities and Exchange Commission. The firm only transacts business in states where it is properly registered, or excluded or exempted from registration requirements.

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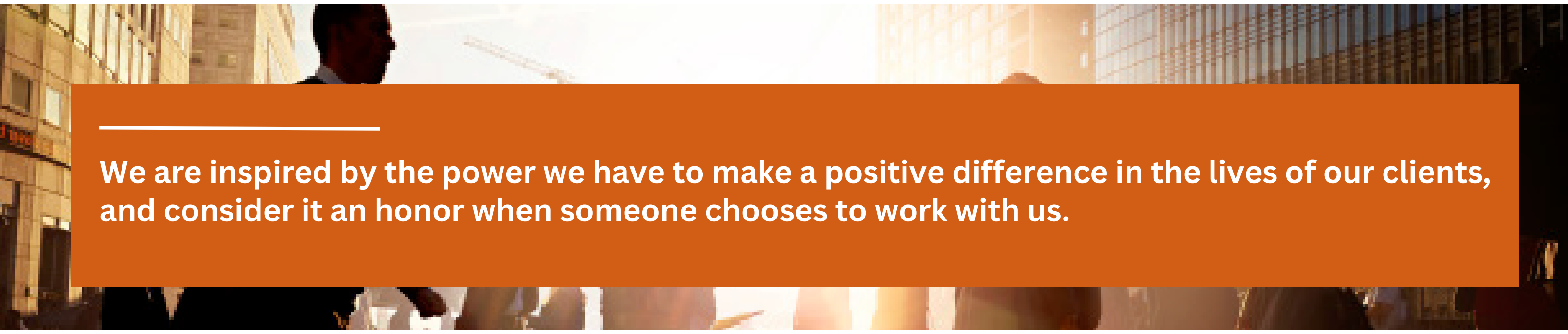
Alexandra Coady | Client Relationship Specialist
acoady@apellawealth.com
Alexandra Coady works as a client relationship specialist for Jason Gentiles team. She is a recent graduate of Central Connecticut State University where she obtained a degree in Biochemistry. Prior to joining the Apella team in 2023, Alex was employed by RBC Wealth management. In her spare time, she enjoys spending time with friends and family, reading, and going to the beach.

Veky Lawrence | Account Services Specialist
vlawrence@apellawealth.com
As an Account Services Specialist Veky Lawrence provides support to Apella Wealth's Financial Advisors and Client Relationship Specialists. Veky has more than 20 years experience in the financial services industry from financial start-ups to Fortune 500 companies. In addition to providing product and operational support Veky fosters a passion for client success and prioritizes customers financial goals. Veky was born in Ecuador and currently resides in Wallingford, Connecticut.



We are inspired by the power we have to make a positive difference in the lives of our clients, and consider it an honor when someone chooses to work with us.

Apella | 151 National Drive, Glastonbury, CT 06033

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