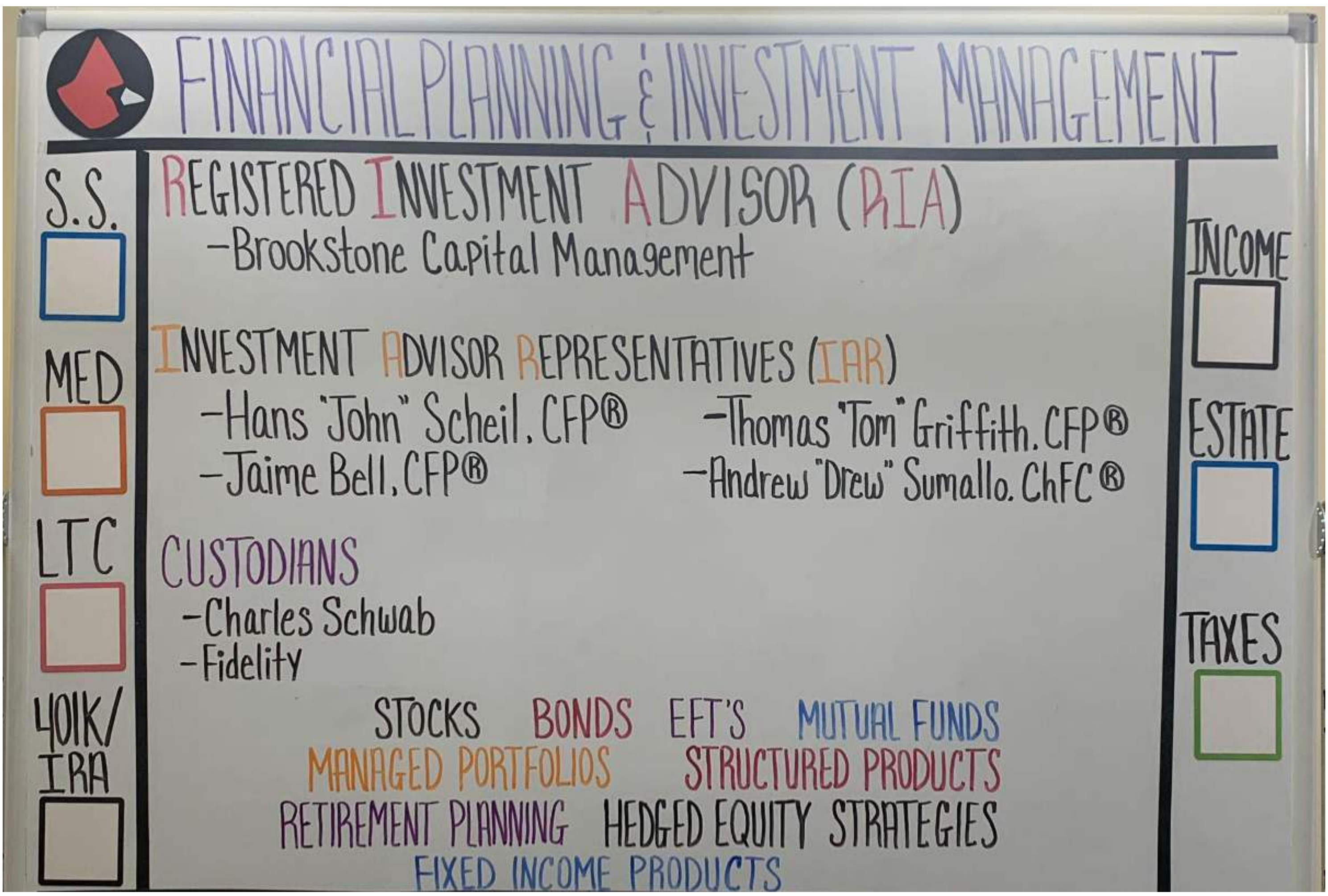
CARDINAL ADVISORS

Financial Planning and Investment Management

Hans and Tom display Cardinal Advisors Financial Planning team while discussing the video entitled "Financial Planning and Investment Management"



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May 2024

Hans "John" Scheil, CFP® **Founder & CEO**

Hans "John" Scheil is the author of The Complete Cardinal Guide and has over 40 years of experience specializing in helping individuals at or near retirement. John's insurance career began at the age of 18, when he sold insurance while attending college full time. His years in the insurance industry included positions as a Branch Manager, National Sales Director, and Senior Vice President for several nationally recognized insurance companies. John holds a Bachelor of Science degree from Northern Illinois University (1980) and a Master of Science in Management from The American College (2007).

John resides in Cary, North Carolina, with his wife, Ronda, and dog, Ellie, and has two grown sons. He is involved locally with StepUp Ministries and the Alzheimer's Association. John enjoys golf, traveling the world, and leadership.

Thomas "Tom" Griffith, CFP® **Vice President**

Tom has been with Cardinal since 2013. He began his career at Cardinal Advisors at its first intern, offered an internship when one didn't exist yet. Tom obtained his licenses for life, health, and Medicare supplements while still in college. Once graduated, he quickly passed his Series 65 in 2015 and has since earned his CFP® certification and become Certified in Long-Term Care (CLTC). Tom is passionate about serving his clients at the required fiduciary standard of care and loves helping others plan for their futures financially.

Tom holds a major in Economics and a minor in History from the University of North Carolina at Chapel Hill.

Tom is married to his beloved wife Chelsey and is smitten as the father of his sons, Renly & Silas. Above all, his greatest joy in life is being a dad. In 2018 he was diagnosed with a rare autoimmune disease, which gives him a unique perspective on planning for the challenges families face when their loved ones are not able to care for themselves.

Andrew Sumallo, ChFC® **Advisor**

Drew joined Cardinal Advisors' team in the summer of 2017 with an interest in financial planning after working in banking for a few years in Charlotte, NC. He graduated from the University of North Carolina at Chapel Hill in 2014 with an Exercise and Sport Science Bachelor's Degree. Drew has earned his ChFC® designation and now operates out of our Charlotte office.

Originally from New Jersey, Drew moved to North Carolina in 2003. He enjoys traveling and fitness.

Jaime Bell, CFP® **Advisor**

Jaime Bell joined Cardinal Advisors' team as a summer intern in 2018, at which point he attained his Life & Annuity, Medicare Supplement/Long-Term Care, and Health insurance licenses. After graduating from Appalachian State University in 2019 with a B.S.B.A. in Finance & Banking, Jaime returned to Cardinal full-time. In the beginning of 2022, Jaime obtained his Series 65 license and began working with Brookstone Capital Management as an Investment Adviser Representative. In August of 2023, Jaime earned his CFP® certification

Jaime grew up in Chapel Hill, NC. When he isn't working, he enjoys cheering for the Mountaineers and listening to music with his cat, Melanie.