

# NEWS

For Immediate Release

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## CoastalOne Executives Named to ADISA Board of Directors and FSI Accounting & Finance Council

*In addition, three CoastalOne financial professionals were named to AdvisorHub’s “Advisors to Watch” rankings*

**WILMINGTON, DE (November 30, 2022)** – [CoastalOne](#), an independent broker-dealer (Coastal Equities, Inc.) and Registered Investment Advisor (Coastal Investment Advisors, Inc.) hybrid platform based in Wilmington, Delaware, recently had multiple company executives named to industry leadership positions, including Michael O’Connor, Chief Financial Officer of CoastalOne, joining FSI’s Accounting & Finance Council, and Amanda Teeple, Senior Vice President of CoastalOne Capital Markets, joining ADISA’s Board of Directors.

“I’m very proud of all of our team members who have received recent recognition within the industry,” said Charles Reiling, President and CEO of CoastalOne. “Our involvement in these organizations will not only increase the knowledge and expertise brought into our firm, but also allows us to share our knowledge and expertise across the industry.”

### COASTALONE CFO JOINS FSI’S ACCOUNTING & FINANCE COUNCIL

[Michael O’Connor](#), CPA, Chief Financial Officer at CoastalOne, was invited to join the [Financial Service Institute](#)’s 2023 Accounting & Finance Council. As part of the council, O’Connor will be responsible for sharing best practices and subject matter expertise through continued education to FSI membership on relevant and timely topics. Ongoing discussions encompass changes and goals related to accounting, FinOps, and the Public Company Accounting Oversight Board (PCAOB).

Members serve three year terms, which may be extended as necessary, with monthly meetings. O’Connor will be participating in the [FSI OneVoice 2023 Conference](#) from January 23<sup>rd</sup> – 25<sup>th</sup> in Palm Desert, California. The conference is a premier in-person gathering for independent financial

services firm executives. Education and networking sessions are specifically designed for CEOs, senior executives, managers, and employees of independent financial services firms.

To learn more about the FSI Accounting & Finance Council, [please click here](#).

## **SENIOR VP OF COASTALONE CAPITAL MARKETS NAMED TO ADISA’S BOARD OF DIRECTORS**

[Amanda Teeple](#), Senior Vice President of CoastalOne Capital Markets, was recently elected to [The Alternative & Direct Investment Securities Association’s 2023 Board of Directors](#). ADISA is the nation’s largest trade association serving the alternative investment and securities industry, providing education, networking, and advocacy for its members. In addition, ADISA actively lobbies for members’ interests on Capitol Hill, and in meetings with lawmakers and regulatory agencies.

To select the directors for their 2023 board, ADISA held democratic elections hosted by a neutral online vendor, which were open to all member categories, with a maximum of three votes per firm. Teeple was one of five elected directors. The Board of Directors is comprised of leaders who have helped build the industry, with each director serving a two-year term that is staggered to allow five or six directors to be elected each year

To see the announcement from ADISA, [please click here](#).

## **THREE COASTALONE FINANCIAL PROFESSIONALS MAKE ADVISORHUB’S “ADVISORS TO WATCH” RANKINGS**

Three financial professionals with CoastalOne were recently named to [AdvisorHub’s 2022 “Advisors to Watch” rankings](#), sponsored by BNY Mellon’s Pershing.

Gregg Somerville of Somerville Investments was ranked #18 in the “Fastest Growing Advisors to Watch” list, and Matt Rakerd of Coastal Investment Advisors was ranked #42 in the same “Fastest Growing” list. The rankings page notes that the advisors won by bringing in new clients, increasing assets, and boosting production.

In addition, Reid Porter of Porter Advisory Group was ranked #42 in the “50 Advisors to Watch (Under \$1B)” list. The fifty ranked advisors have assembled efficient and productive teams that have achieved scale without compromising their level of service, while maintaining healthy growth.

The ranking criteria for all AdvisorHub’s “Advisors to Watch” lists fell into three main categories: 1) Scope of practice measured by assets, production, and level of service; 2) Growth of practice consisting of year over year growth in assets, households, and production; and 3) Professionalism which includes regulatory record, community service, and team diversity.

To see the full “Fastest Growing Advisors to Watch” list, [please click here](#). To see the full “50 Advisors to Watch (Under \$1B)” list, [please click here](#).

## **COASTALONE CMO LISTED AS ONE OF THE 10 MOST AMBITIOUS CMOS TO WATCH IN 2022**

[Debra Karrat](#), Chief Marketing Officer at CoastalOne, was named one of “The 10 Most Ambitious CMOs to Watch in 2022” in the October issue of The Women Achiever Magazine, in addition to being featured on the cover. In the full profile, Karrat discusses her role at CoastalOne, her background and career path, CoastalOne’s recent innovations, and where she sees the industry going in coming years.

“In the last couple of months, we have seen a big transition in our industry,” said Karrat in the piece. “There is a significant trend toward consolidation, new fund offerings, and fintech. I think firms will realize they have to pick a lane and excel in their domain.”

To see the full profile in The Women Achiever Magazine, [please click here](#).

## **COASTALONE CONTINUES STRONG GROWTH TRAJECTORY**

CoastalOne has continued its strong growth trajectory in recent months, adding eight new financial professionals in the last quarter. In addition, the firm continues to support new initiatives for their advisors, including a new gift microsite in partnership with [Lucia & Company](#), a high-end gourmet gift company that specializes in helping nurture and cultivate client relationships, as well as a new webinar series that is launching in December, which will include topics like pro bono opportunities, strategies for 2023, and even a nutrition seminar to help support healthy lifestyles in the new year.

## **ABOUT COASTALONE**

CoastalOne, located in Wilmington, Delaware, is an independent broker-dealer and RIA hybrid platform that enables financial professionals to maximize the success of their practices. CoastalOne is comprised of Coastal Investment Advisors, Inc. (CIA), an SEC Registered Investment Advisor; Coastal Equities, Inc. (CEI), a FINRA registered independent broker-dealer; and Coastal Capital Markets, the managing broker-dealer (MBD). CoastalOne is focused on providing professionals with dedicated support, integrated technology, and a deep understanding of regulatory framework so they can deliver outstanding service and personalized guidance to their clients. Their goal is to become the firm of choice for independent financial professionals and their clients, and their mission is to build life-long client relationships from a foundation of personal service, trust, and collaboration. Learn more at [www.Coastal-One.com](http://www.Coastal-One.com).

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