Meet Your Leverty Financial Group Team

Mike Leverty

Founder & CEO

Mike specializes in guiding your transition into retirement, which includes helping calculate your expected expenses and sources of income, such as pensions, savings, and investments. His goal is that you have a clear plan and maintain your desired lifestyle during retirement.

Luke Keene

Partner & CIO

Luke, as Chief Investment Officer (CIO), chairs our Investment Committee, ensuring that any market-related concerns affecting our clients are a top priority. He also serves as an advisor, helping you clarify, organize, and execute your financial goals.

Josh Hawkins

Partner & VP of Planning

Josh plays a pivotal role in developing your financial plan. He takes your data, thoroughly analyzes it, and crafts a tailored financial plan. His involvement spans from the initial stages of designing your plan to collaborating with you during the ongoing plan reviews.

Mike Nelson

Director of Investment Operations

Mike leads the investment operations department, where he is responsible for executing our investment portfolio administration, managing trading activities, and ensuring thorough reporting. You'll work closely with him when setting up and transferring your accounts, as well as during the ongoing implementation of your financial plan.

Holly Pizzi

Director of Risk Services & Human Resources

Holly manages our insurance practice, alongside her responsibilities in internal human resources. If you have any concerns or questions related to insurance, she can assist you.

Chantel Mitchell

Marketing & Communications Specialist

Chantel manages our social media platforms, marketing, public relations, and community engagement. She is likely to greet you at the door and keep you informed through our quarterly newsletter, ensuring an enjoyable and engaging client experience.

Matt Gendreau

Investment Operations Associate

Matt executes a wide range of daily service requests which includes processing deposits and withdrawals, facilitating IRA distributions, and managing charitable gifts. His responsibilities are key to delivering efficient and effective financial services.

Emma Kempfert

Executive Assistant & Insurance Operations

Emma works with you to coordinate meetings and assists with the implementation and ongoing maintenance of insurance policies. She supports our advisors, and assists in office management.