

COASTALONE

Contact Matrix

Toll-Free
1 (888) 657-5200

For help with...

Operations Option 1

- Service Requests
- Account Maintenance

First Stop

Operations Inbox
operations@coastal-one.com

Escalation 1

Cathi Fischer
cathi@coastal-one.com
(302) 543-2781

Final Escalation

Barb Trimbur
btrimbur@coastal-one.com
(717) 759-3261

Frontline Supervision Option 2

- Service Request Approval
- Check Logs

Stephanie Beach sbeach@coastal-one.com (302) 485-9010
Dan Foraker dforaker@coastal-one.com (302) 409-3932
Laura Gates lgates@coastal-one.com (302) 321-5535

Aileen DeFroda
adefroda@coastal-one.com
(302) 409-3933

Alternatives Supervision Option 3

- Alternatives Paperwork
- Alternatives Trade Approvals

Alt Supervision Inbox
altsupervision@coastal-one.com

Phinon Woodside
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(302) 786-6970

Kathi Mansfield
kmansfield@coastal-one.com
(302) 797-1881

Advertising Review Option 4

- Public Speaking Requests
- Advertising Submissions
- Stationery Review

Advertising Inbox
advertising@coastal-one.com

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(302) 321-5535

Aileen DeFroda
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(302) 409-3933

Commissions Option 5

- iSolved & Sycamore
- 1099s & Pay Questions

Commissions Inbox
commissions@coastal-one.com

Jamie Fardone
jfordone@coastal-one.com
(302) 485-5984

Mike O'Connor
moconnor@coastal-one.com
(302) 260-6656

Compliance Option 6

- Residential/Office Address Updates
- Registration Questions
- Disclose New OBA/Personal Trading Account

Compliance Inbox
compliance@coastal-one.com

Sandy Fries
sfries@coastal-one.com
(302) 298-1351

Barrett Schultz
bschultz@coastal-one.com
(302) 759-8352

Technology Option 7

- Password Resets
- Tech Entitlements/Access

Technology Inbox
tech@coastal-one.com

Dan Rhoads
drhoads@coastal-one.com
(302) 543-2780

Ken Fischer
kjf@coastal-one.com
(302) 250-4731

Private Market Products Option 8

- AI Insight
- Alts Product Review Requests
- Alts Approved Products List

Due Diligence Inbox
dd@coastal-one.com

Ross Fronk
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Craig Merkt
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