MEET OUR TEAM

We are a full service, multi-generational financial services team within ALLIED WEALTH PARTNERS. With our combined experience and expertise, we help clients make smart financial decisions, pursue their goals and secure their legacies.

We welcome new clients while continuing to nurture long-term client relationships reaching back more than 30 years. Our team provides a broad range of expert resources along with tools and support staff to help assist clients achieve financial success.

*Click on the name for background details

John P. Sullivan, CFP®, PFS, CPA (inactive).

Has over 30-years of experience as a financial advisor, following a successful career as a Treasurer of a Fortune 1000 company and Sr. Manager at a Big Four CPA firm. John is known for his comprehensive and personal approach to help clients pursue their financial goals.

Rosemary Johnson, MPA

Has worked side by side with John for the last 20+ years as Administrative Manager and registered staff, taking care of the everyday needs of their clients. Rosemary also had a successful career in the corporate world.

Jason S. Klein, CFP®, ChFC

Offers 15 years of financial services experience including being a trader on Wall Street. Jason has a wealth of knowledge helping individual clients and small businesses with a specialty on medical practices.

Jim Whelan, ChFC

Adds the third-generation tier to the Team and adds a fresh perspective and limitless energy. Clients appreciate his contributions in dealing with the next generation.

generation.

Terry Cavaliere

Brings over 20 years of financial services experience with broad knowledge of insurance and helps guide us and our clients obtain insurance coverages. Terry handles many practice related responsibilities.

Gary Lynch, VP Investments

VP of Investments for Allied Wealth Partners. Gary provides extensive knowledge of all aspects of investments and portfolio analysis. Gary has 20 years of experience as a financial advisor.

Michael Boudway, CFP®

Has over 15 years of experience as a financial advisor preceded by 15 years in the corporate world. Michael focuses his practice helping small businesses and individuals with their financial needs.

Mary O'Connor, SHRM- SCP

VP of Human Resources and Administration for Allied Wealth Partners. Mary is key to the success of AWP and the staff that helps us to meet the needs of our clients.

"INTEGRITY IS THE BOTTOM LINE!"