PENOBSCOT
FINANCIAL ADVISORS

P: 207.990.1901 | F: 877.369.2947
9 May Street, Bangor Maine 04401
www.penobscotfa.com

Operations Team

Hannah Tackett
OPERATIONS MANAGER

Hannah began her career with PFA in 2013 and is the firm's Operations Manager. That's just another way of saying "she does it all." Hannah manages the firm's infrastructure, spending most of her time managing technology with a focus towards operational efficiencies. She collaborates with co-workers and vendors to deliver necessary resources for serving clients. Pairing nicely with her work implementing policies/procedures, Hannah also works closely with Craig Joncas to manage the firm's compliance program. That part can be a bore, so she is also involved in the firms marketing efforts – contributing towards the vision and managing events/activities. Hannah sits on the following committees at PFA: Operations & Marketing.

Outside of work, Hannah enjoys playing volleyball, baking, relaxing at the family lake house, and taking lawn games far too seriously.

Julie Willette
CLIENT RELATIONS SPECIALIST

Julie began her career with PFA in 2015 and is the firm's Client Relations Specialist. If you need something done, contact Julie. She is the friendly voice that greets you on the phone, and makes sure your requests are handled in an efficient manner. Julie manages the firms ongoing transactions list, ensuring they are completed in a timely and accurate manner – all while keeping you informed along the way. She works closely with the firm's advisors, and Hannah Tackett, to ensure we are tackling our to-do list. You may also hear from Julie when it's time to schedule a review meeting. Julie sits on the following committees at PFA: Operations.

After hours, Julie can be found cheering on her family members at various sporting and intramural events. She is also expecting her first child, Chandler, very soon!

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Financial Planning & Investments Team

Jim Bradley, CFA, AIF, CFP

FOUNDER & CHIEF INVESTMENT OFFICER

Jim founded Penobscot Financial Advisors (formerly Bradley & Johndrow) in 1999. He is the team's visionary and most seasoned professional. Jim works as a Client Advisor to a select group of the firm's relationships, partnering to ensure they achieve financial success. As Chief Investment Officer and a CFA, Jim also leads the firm's Investment Committee and related decision making. Despite his list of designations, he's not a complete nerd, as he also leads the firm's marketing efforts working closely with Hannah and Craig. Jim sits on the following committees at PFA: Investment & Marketing

When he's not in the office, he's probably teaching people how to fly, gigging with his bluegrass band, digging in the dirt as a Master Gardener Volunteer or serving on a nonprofit board.

Craig Joncas, CFP

MANAGING PRINCIPAL & CHIEF COMPLIANCE OFFICER

Craig began his career with PFA in 2008, and is the firm's Managing Principal. He works as a Client Advisor for many of the firm's relationships. He also works closely with Hannah Tackett, staying at the forefront of industry developments to move PFA forward. As Chief Compliance Officer, Craig is also forced to be the bad guy – ensuring that the firm performs its duties efficiently, but with an eye towards doing it the right way. He also leads our Financial Planning Committee, bringing the team together to discuss real life solutions for clients. Craig sits on the following committees at PFA: Operations, Financial Planning, Investment, and Marketing.

Craig enjoys a wide range of activities when not in the office. He is an avid bowler, recently got back into his golf game, and enjoys spending time getting outdoors with family. You also might find him exploring the Portland food scene.

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Financial Planning & Investments Team *(continued)*

Lauren Ulman
Financial Advisor

Lauren began her career with PFA in 2010, and is a Financial Advisor. She works as a Client Advisor for many of the firm's relationships, and works hard to deliver the highest standard of client satisfaction. Lauren serves on the Financial Planning Committee, and takes an interest in research projects for the firm. She spends time on complicated planning issues, including the completion of a Student Loan Repayment program that enables her to consult with clients on strategies. She is dedicated to furthering her education, and is currently working towards her Chartered Financial Consultant designation. Lauren sits on the following committees at PFA: Financial Planning & Investment.

Outside the office, Lauren enjoys time spent with her family, reading a good book, and biking.

Hannah Strickland
Portfolio Manager

Hannah began her career with PFA in 2017, and is the firm's Portfolio Manager. She is dedicated to our asset management process, and does most of the heavy lifting. This includes research, modeling, reporting, and trading functions. In addition, she will be keeping up on the markets and providing commentary to our clients on a routine basis. She occasionally appears from her research cave, though, as she will also attend client meetings when necessary. Hannah is a Level 2 candidate for the CFA Designation. Hannah sits on the following committees at PFA: Investment & Financial Planning.

When not in the office, Hannah enjoys getting outdoors, traveling, and spending time with her family. In the summer, you can find her running at Back Cove, relaxing at the beach, or working on her golf game. In the winter, she can be found hitting the slopes or at home enjoying a good book.