

# THE PROPER ANALYSIS

A Registered Investment Adviser

## Your Team

is on call for questions and requests

**William D. Proper, CPA**  
Chairman

wproper@properanalysis.com  
x114

**Anne P. Ogan, CFA**  
President

aogan@properanalysis.com  
x115

Corporate Telephone:  
216-595-3842

Corporate Toll-Free Number:  
800-571-0935

Corporate Fax:  
216-831-2651

Corporate Website Address:  
[www.properanalysis.com](http://www.properanalysis.com)

**Tina Cappelli**  
Client Associate

For Client Service or Operations Support  
Withdrawals or Deposits  
Account Set-Ups or Changes

tcappelli@properanalysis.com  
X108

**Greg Goldfeder, CFA**  
Senior Research Analyst

For Investment Research  
For Portfolio Reviews  
On Portfolio Management

ggoldfeder@properanalysis.com  
X120

**Lisa Neely**  
Senior Relationship Manager

For Portfolio Reviews  
For Questions About Investing  
To Refer a Potential Client  
For Report Requests  
About our Website or Schwab Alliance

lneely@properanalysis.com  
x121

**Lee Newberg & Ashley Stotter**  
Trading Desk Coordinator

For Trading Questions

lnewberg@properanalysis.com  
X111

astotter@properanalysis.com  
x101

**Shannon Woodthorpe**  
Administrative Assistant

For Client Service Questions or Concerns  
To Schedule an Appointment

swoodthorpe@properanalysis.com  
x100

**Schwab Alliance Customer Service**

800-515-2157  
Monday – Friday  
8:30 a.m. – 7:00 p.m. EST

**Schwab – Legacy Village**

216-291-9333  
24737 Cedar Road  
Lyndhurst, Ohio 44124

3201 Enterprise Parkway, Suite 320  
Beachwood, Ohio 44122