wealth.com

Meet your dedicated team

Executive Sponsors



Rafael Loureiro

Co-Founder & Chief Executive Officer

Rafael is a technology entrepreneur and executive with a passion for product innovation. He has 20+ years of experience in technical leadership, including startup, growth-stage, and Fortune 500 companies. Prior to founding Wealth.com, he served as the Chief Technology Officer at Emailage, a global fraud prevention SaaS startup which was acquired by LexisNexis Risk Solutions in March 2020. He is a member of the Forbes Finance Council and was named the 2024 CEO of the Year by ThinkAdvisor.



Danny Lohrfink

Co-Founder & Chief Product Officer

Prior to Wealth.com, Danny served as Business Lead of SoFi's wealth management division, SoFi Invest. Before that, Danny held several roles at Goldman Sachs Private Wealth Management. Most recently, Danny was a Vice President on the PWM Management team, where he was responsible for leading strategic projects and initiatives. Danny was a standing member of the Operational Experience Group (OEG) and the Client Experience Group (CEG). Danny graduated cum laude from Georgetown University with a Bachelor of Science in Business Administration. He has been recognized as one of Financial Planning's 7 Rising Stars of 2024.



Tim White

Co-Founder & Chief Growth Officer

Tim is Co-Founder and Chief Growth Officer of Wealth.com, where he leads growth strategy, strategic partnerships, and business development. Previously, Tim was Chief Partnership Officer at Emailage, a global fraud prevention provider, where channel revenue was the fastest-growing stream. He built relationships with industry leaders, including LexisNexis Risk Solutions, a RELX company, which acquired Emailage in 2020. Tim was named to the InvestmentNews Hot List in 2026 and was a finalist for Partnership Executive of the Year at the 2026 Wealth Management Industry Awards.

Institutional Partnerships & Account Management



Lauren Klein

Head of Institutional Partnerships

Lauren serves as Head of Institutional Partnerships at Wealth.com, where she leads strategic relationships with financial institutions and enterprise partners. She oversees partnerships with multiple top 10 U.S. banks that have deployed Wealth.com's estate and tax planning technology across their advisor networks and client bases. Lauren focuses on strengthening institutional relationships and helping organizations deliver sophisticated planning capabilities at scale. She works closely with institutional stakeholders to support long-term collaboration and adoption.



Andy Miller

Director of Strategic Account Management

Andy serves as Director of Strategic Account Management at Wealth.com, where he leads account management for some of the company's largest and most strategic partnerships, including its institutional relationships. He will serve as Fidelity's dedicated Account Manager and primary point of contact. Andy coordinates Wealth.com's product, engineering, enablement, and support teams to keep deployments on schedule and help institutional partners get the most from the platform. As the partnership grows, his team will scale alongside it. He focuses on proactive relationship management, close collaboration with institutional stakeholders, and long-term partnership success.

Security, Compliance & Technical Implementation



Jair Basso

VP of Compliance

Jair serves as Vice President of Compliance at Wealth.com, where he leads the company's compliance program, overseeing regulatory requirements, internal policies, and risk management practices. He plays a key role in supporting institutional partnerships and will help guide Fidelity's Vendor Technology Review and AI Risk Review processes.



Bogdan Ilisie

VP of Engineering

Bogdan serves as Vice President of Engineering at Wealth.com, where he helps lead the development, architecture, and technical execution of the firm's estate and tax planning technology. He will lead the technical implementation of Fidelity's deployment, including the single-tenant environment, single sign-on, and integrations. He works closely with product and engineering teams to build scalable, reliable solutions that support the evolving needs of financial advisors and institutional clients. His leadership focuses on engineering excellence, platform performance, and the advancement of Wealth.com's technology.



Anne Rhodes

Chief Legal Officer

Anne serves as Chief Legal Officer at Wealth.com, where she oversees the company's legal, contracting, and regulatory matters. Before joining Wealth.com, Anne was an estate planning attorney at McDermott Will & Emery in New York and Perkins Coie in San Francisco. There she advised clients ranging from individuals building first-generation wealth to ultra-high-net-worth families planning across generations. Her practice focused on complex wealth transfer and tax planning strategies. She graduated from Columbia Law School.

Product, Legal & Tax



Nicole McMullin

SVP of Product

Nicole serves as Senior Vice President of Product at Wealth.com, where she helps lead product strategy, development priorities, and the continued evolution of the firm's estate and tax planning platform. Working across product, engineering, and client-facing teams, she focuses on delivering innovative solutions that address the needs of financial advisors, enterprises, and the clients they serve. Her leadership helps shape Wealth.com's product vision and ensures the platform continues to deliver meaningful value across the wealth management industry.



Shawver Adams

Head of Knowledge, Tax Planning

Shawver serves as Head of Knowledge, Tax Planning at Wealth.com, where he helps guide the tax expertise and technical knowledge underlying the firm's tax planning capabilities. Working alongside product and engineering teams, he focuses on translating complex tax concepts and planning considerations into practical, accessible technology for financial advisors. His work supports the accuracy, relevance, and continued evolution of Wealth.com's tax planning solutions.



Chris Nason

Head of Private Wealth

Chris leads private wealth strategy at Wealth.com, embedding sophisticated estate and tax planning intelligence into the platform's architecture, advisor experience, and AI-driven workflows. A recognized authority on complex domestic and international wealth transfer planning, Chris serves as managing editor of International Estate Planning, the leading treatise on U.S. estate and income taxation of foreign nationals, and teaches Trusts and Estate Planning at Stanford Law School. He has been named to Best Lawyers: Ones to Watch in America for five consecutive years. Prior to Wealth.com, Chris spent 12 years as a partner at McDermott Will & Emery.

Support & Client Experience Leads



Charlotte Young

Director of Product Experience and Enablement

Charlotte serves as Director of Product Experience and Enablement at Wealth.com, where she helps clients and internal teams navigate, understand, and adopt the firm's technology. Her work bridges product capabilities, education, and client experience, ensuring advisors have the knowledge needed to make the most of Wealth.com's estate and tax planning solutions. In 2026, she was named to InvestmentNews' Women to Watch list for WealthTech & Innovation Leaders. Charlotte plays a key role in supporting product adoption, user enablement, and a consistent client experience.



Manjit Toor

Client Support Team Lead

Manjit serves as Client Support Team Lead at Wealth.com, where she helps oversee the delivery of responsive, knowledgeable support to the firm's clients and advisor teams. She focuses on resolving client needs, coordinating support resources, and ensuring users receive timely assistance as they navigate Wealth.com's platform. Through her leadership, Manjit helps maintain a high standard of service while supporting the day-to-day use of Wealth.com's estate and tax planning solutions.