



OUR TEAM

A Better Personal Approach.

At Three Oaks Advisory Group, we free our clients from carrying the burden of managing the complexities that come with success and wealth. Each Three Oaks advisor applies expertise and passion by creating action plans that can be easily implemented by clients and their coordinated wealth management team.

We are committed to the highest level of professional education, which is why we hold some of the most distinguished designations in the industry:

CFP®
Certified Financial Planner

CDFATM
Certified Divorce Financial Analyst

AEP®
Accredited Estate Planner

CRPC®
Chartered Retirement Planning Counselor



PHILIP ATHEY
// CRPC®, CFP®

Areas of Expertise.

- Education planning
- Retirement planning
- Operations/management

Education.

Texas Tech University
BBA, Marketing

College for Financial Planning
Certified Financial Planner | CFP®

College for Financial Planning
Chartered Retirement
Planning Counselor | CRPC®

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pathey@threeoaksag.com



DAVID DROPPA
// CFP®, CDFATM

Areas of Expertise.

- Multi-generational wealth management
- Collaborative divorce financial planning
- Comprehensive planning for physicians

Education.

Whitman College
BA, Psychology

The Institute for Divorce Financial Analysts
Certified Divorce Financial Analyst | CDFATM

College for Financial Planning
Certified Financial Planner | CFP®

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ADAM KELLER
// CFP®, AEP®

Areas of Expertise.

- Retirement planning
- Estate planning
- Executive compensation planning

Education.

The University of Texas Austin
BBA, International Business

The American College & The NAEP
Accredited Estate Planner | AEP®

College for Financial Planning
Certified Financial Planner | CFP®

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SHAWN ESCOLLIES
// Client Services Associate

Areas of Expertise.

- Client relationship management
- Management of client communication systems
- Directing new account establishment and ongoing maintenance

Experience.

- Client service, licensing and compliance
- Administrative process implementation and system development

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RAQUEL DE LEON
// Client Services Associate

Areas of Expertise

- Client experience management
- Managing service delivery systems
- Vendor management

Experience.

- Licensing and regulatory compliance
- Project operations and management

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