

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 start-up, growth-stage, and Fortune 500 companies. Prior to founding Wealth, 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 an avid community leader in the Phoenix start-up community.
Rafael's leadership has been recognized across the industry:

- 2023: Hispanic Wealthtech Leader of the Year, Wealth Solutions Report
- 2024: Advisor Choice Award, Technology Provider CEO of the Year, Wealth Management Industry Awards
- 2025:
  - Finalist, CEO of the Year, Wealth Management Industry Awards
  - Finalist, CEO of the Year, ThinkAdvisor Luminary Awards
  - InvestmentNews Hot List honoree
  - Forbes Top AI Founders to Watch

Originally from France but raised in Brazil, Rafael is a committed Phoenix Suns fan. In his free time, he loves spending time with his family, playing Pickleball, video games, reading, and hiking in the Arizona desert.



Danny Lohrfink

Co-Founder & Chief Product Officer

Prior to Wealth, 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.

When he's not working, Danny enjoys spending time with his family as well as hiking, skiing, and running. Danny holds a WSET Level 2 Award in Wines and is known to share his passion for winemaking with anyone that will listen.



Anne Rhodes

Chief Legal Officer

Prior to joining Wealth, Anne was an estate planning attorney first at McDermott Will & Emery (New York), then at Perkins Coie (San Francisco). She advised a range of clients, including individuals building first-generation wealth to ultra high net worth families across generations. Anne's practice focused on complex wealth transfer and tax planning strategies. She graduated from Columbia Law School. In her spare time, Anne enjoys exploring the Bay Area with her toddlers.



Tim White

Co-Founder & Chief Growth Officer

Tim is a highly accomplished sales and business development fintech executive, with a strong track record of managing global partnerships and cultivating strategic relationships. Prior to co-founding Wealth.com, Tim served as Chief Partnership Officer at Emailage, a global fraud prevention provider. Under Tim's leadership, channel revenue was consistently the company's fastest-growing revenue stream. As part of Tim's responsibilities, he cultivated the company's strategic relationships, including with LexisNexis Risk Solutions, a RELX company, which subsequently acquired Emailage in 2020. When Tim is not on planes traveling to events and meeting with partners, he is spending time with his wife, son and pup hiking the Sonoran Desert mountains near his home in Scottsdale. Tim is an avid runner and enjoys nothing more than movie night at home with his family.



Kyle Pounder

Chief Technology Officer

Prior to joining Wealth, Kyle worked in analytics and data science at Facebook/Meta and Emailage/LexisNexis Risk Solutions. In those roles, he worked with and alongside product teams, leveraging data to inform the development of several 0-1 products. Kyle's background is as a mathematician and educator. He graduated from the University of Arizona with his Ph.D. in Mathematics. Before and during his graduate work, he also spent many years in the classroom teaching mathematics to undergraduate and high school students. When he's not working, Kyle enjoys playing tennis and spending time with his family, including two mini goldendoodles.



Matt Giumbarda

Chief Financial Officer

Matt is an organizational optimizer, connector, and problem solver specializing in fast-growing technology company environments. Over the past 15 years, he has held Finance and Operations leadership positions at a handful of technology companies in the Consumer and Enterprise sectors. Prior to Matt's operational roles, he was an investment banker in the Technology and Digital Media verticals, advising clients on a range of transaction types including IPOs, private placements of debt and equity, and buy-side and sell-side M&A. Matt was raised in St. Louis, MO, and most recently spent a decade on the West Coast before relocating with his family to Park City Utah in 2021. When not outside in nature enjoying all the amenities the area has to offer, Matt follows several less prominent sports including Premier League soccer, Formula One racing, and Australian football.



Dan Bolton

Chief Marketing Officer

Dan Bolton is an accomplished marketing leader with a track record of driving growth and innovation in the fintech and wealth management industries. As CMO at Wealth.com, Dan spearheads efforts to elevate the brand, generate demand, and solidify the company's position as a leader in wealth technology. Recognized as a 2025 InvestmentNews Rising Star, a 2024 NextGen Rising Star by ThinkAdvisor, and a finalist for CMO of the Year at the 2025 ThinkAdvisor Luminary Awards, Dan also led the team named 2024's Marketing Department of the Year by the Business Intelligence Group. His work has been honored six times as a finalist at the Wealth Management Industry Awards. Outside of work, Dan enjoys running through Atlanta and spending time with his family.



Chris Nason

Head of Private Wealth

Chris leads Wealth.com’s private wealth strategy, embedding sophisticated estate and tax expertise directly into the platform’s architecture and advisor workflows. He partners closely with product and engineering to ensure the technology reflects the legal precision required for complex, multigenerational and cross border planning.