



# The ESOP Group

## Meet our team



Wealth  
Management

# The ESOP Group overview

The ESOP Group is an experienced team of professionals focused exclusively on the unique needs and challenges of business owners and their families. For more than 30 years we have provided advice to our clients, guiding them through major milestones in their businesses and lives. Our clients entrust us to coordinate the resources of our firm, professional network and team to tailor solutions that help fulfill their goals and preserve their legacy. Whether helping our clients build a succession plan for their company, a wealth plan for their assets, or working with their trusted tax and legal professionals to create a trust or estate plan, our goal is to help make life's biggest financial decisions easier.

## The ESOP Group is proud to be recognized

- Barron's Top 100 Private Wealth Management Teams in 2023
- Forbes America's Top Wealth Management Teams in 2022
- Forbes Best-In-State Wealth Management Teams in 2023, 2025 and 2026

## Certain members of The ESOP Group have these recent accomplishments:

### Leslie A. Lauer

- Barron's Top 1,200 Financial Advisors, 2022, 2023
- Barron's Top 100 Women Advisors, 2022, 2023
- Forbes America's Top Women Wealth Advisors, 2022, 2023
- Forbes Top Women Wealth Advisors Best-In-State, 2022, 2023, 2025 and 2026
- Forbes America's Top Wealth Advisors, 2022, 2023
- Forbes Best-In-State Wealth Advisors, 2022, 2023, 2025 and 2026
- AdvisorHub Women to Watch, 2026

### Rebecca T. Glasgow

- Barron's Top 1,200 Financial Advisors, 2022, 2023
- Barron's Top 100 Women Advisors, 2023
- Barron's Top 1,500 Financial Advisors, 2026
- Forbes America's Top Women Wealth Advisors, 2022, 2023
- Forbes Top Women Wealth Advisors Best-In-State, 2022, 2023, 2025 and 2026
- Forbes Best-In-State Wealth Advisors, 2022, 2023, 2025 and 2026
- InvestmentNews \$100M Club: Top Female Advisors, 2025
- AdvisorHub Women to Watch, 2026

### Curt Rubinas, CEPA®

- Forbes Best-In-State Wealth Advisors, 2023, 2025 and 2026
- Barron's Top 1,500 Financial Advisors, 2026

**Investment and insurance products offered through RBC Wealth Management are not insured by the FDIC or any other federal government agency, are not deposits or other obligations of, or guaranteed by, a bank or any bank affiliate, and are subject to investment risks, including possible loss of the principal amount invested.**

The 2026 Barron's "Top 1,500 Financial Advisors" award was announced March 2026. Data as of Sept. 30, 2025. The award is based on the following criteria: individual with a minimum of seven years' experience in the industry, client retention reports, assets under management, revenue produced for the firm and acceptable compliance record. The financial advisor does not pay a fee to be considered for or to receive this award. This award does not evaluate the quality of services provided to clients. This is not indicative of this financial advisor's future performance.

The 2023 Barron's "Top 100 Private Wealth Management Teams" award was announced April 2023. Data as of 12/31/2022. The award is based on quantitative criteria (such as assets under management and revenue produced for the firm), regulatory records, credentials of the team members, and other qualitative criteria. The financial advisor does not pay a fee to be considered for or to receive this award. This award does not evaluate the quality of services provided to clients. This is not indicative of this financial advisor's future performance.

The 2022 Forbes "Top Wealth Management Teams" award was announced November 2022. Data as of 3/31/22. Forbes America's Top Wealth Management Teams ranking was developed by SHOOK Research and is based on in-person, virtual and telephone due diligence meetings and a ranking algorithm that includes: a measure of each team's best practices, client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. SHOOK's research and rankings provide opinions intended to help investors choose the right financial advisor and team, and are not indicative of future performance or representative of any one client's experience. Past performance is not an indication of future results. Neither Forbes nor SHOOK Research receive compensation in exchange for placement on the ranking. For more information, please see [www.SHOOKresearch.com](http://www.SHOOKresearch.com). SHOOK is a registered trademark of SHOOK Research, LLC.

See next page for additional disclosures.

# Why clients choose us

## Experienced

Our team of ten investment professionals includes an experienced Chartered Financial Analyst®, three CERTIFIED FINANCIAL PLANNER® professionals, four Certified Exit Planning Advisors, a Chartered Retirement Planning Counselor<sup>SM</sup>, a Chartered Alternative Investment Analyst (CAIA®), and a Chartered Financial Consultant®.

## Focused

We maintain a low client-to-team-member ratio to deeply understand our clients' priorities and the challenges they face. Our deep connections within RBC Wealth Management expedite our ability to deliver solutions to our clients.

## Multigenerational

We are a multigenerational team spanning three generations, backed by the full resources of one of the world's largest wealth management firms, RBC Wealth Management.

Having managed assets through four recessions, our senior partners bring wisdom and experience, while younger partners bring relevance and continuity to our clients.

The 2026 AdvisorHub Women to Watch award was announced April 2026. Data as of 12/31/2025 was provided and considered for this award. The ranking recognizes advisors across the country for their quality of practice, professionalism, character and community involvement. Criteria considered included: assets under management, production/revenue and team size. The financial advisor does not pay a fee to be considered for or to receive this award. This award does not evaluate the quality of services provided to clients. This award is not indicative of this financial advisor's future performance.

The 2026 Forbes "America's Top Women Wealth Advisors" and "Top Women Wealth Advisors Best-In-State" award was announced February 2026. Data as of 9/30/2025. The 2025 Forbes "America's Top Women Wealth Advisors" and "Top Women Wealth Advisors Best-In-State" award was announced February 2025. Data as of 9/30/2024. The 2023 Forbes "Top Women Wealth Advisors" and "Top Women Wealth Advisors Best-In-State" award was announced February 2023. Data as of 9/30/2022. The 2022 Forbes "Top Women Wealth Advisors" and "Top Women Wealth Advisors Best-In-State" award was announced February 2022. Data as of 9/30/2021. The award was developed by SHOOK Research and is based on in-person, virtual and telephone due diligence meetings and a ranking algorithm that includes: a measure of each team's best practices, client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance was not an award criterion. Rankings are based on the opinions of SHOOK Research, LLC and not indicative of future performance or representative of any one client's experience. The financial advisor does not pay a fee to be considered for or to receive this award. This award does not evaluate the quality of services provided to clients. For more information: [www.SHOOKresearch.com](http://www.SHOOKresearch.com).

The 2026 Forbes "Best-In-State Wealth Management Teams" award was announced January 2026. Data as of 3/31/25. The 2025 Forbes "Best-In-State Wealth Management Teams" award was announced January 2025. Data as of 3/31/24. The 2023 Forbes "Best-In-State Wealth Management Teams" award was announced January 2023. Data as of 3/31/22. The award was developed by SHOOK Research and is based on in-person, virtual and telephone due diligence meetings and a ranking algorithm that includes: a measure of each team's best practices, client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance was not an award criterion. Rankings are based on the opinions of SHOOK Research, LLC and not indicative of future performance or representative of any one client's experience. The financial advisor does not pay a fee to be considered for or to receive this award. This award does not evaluate the quality of services provided to clients. For more information: [www.SHOOKresearch.com](http://www.SHOOKresearch.com).

The 2025 InvestmentNews "\$100M Club: Top Female Advisors" award was announced August 2025. To be eligible, nominees had to be female advisors with a minimum of \$100 million in individual assets under management as of 12/31/2024. All nominee information was verified by their compliance teams before acceptance. Final ranking was determined by a weighted formula based on overall AUM, AUM growth, and client growth between 1/1/2024 and 12/31/2024. The financial advisor does not pay a fee to be considered for or to receive this award. This award does not evaluate the quality of service provided to clients and is not indicative of the advisor's future performance.

The 2023 Barron's "Top 1,200 Financial Advisors" award was announced March 2023. Data as of 9/30/2022. The 2022 Barron's "Top 1,200 Financial Advisors" award was announced March 2022. Data as of 9/30/2021. The award is based on the following criteria: The individual is credentialed as a FINRA registered representative, assets under management, revenue produced for the firm, regulatory and compliance record. The financial advisor does not pay a fee to be considered for or to receive this award. This award does not evaluate the quality of services provided to clients. This is not indicative of this financial advisor's future performance.

The 2023 Barron's "Top 100 Women Financial Advisors" award was announced June 2023. Data as of 3/31/2023. The 2022 Barron's "Top 100 Women Financial Advisors" award was announced June 2022. Data as of 3/31/2022. The award is based on the following criteria: professionals with a minimum of 7 years financial services experience, acceptable compliance records, client retention reports and more. The financial advisor does not pay a fee to be considered for or to receive this award. This award does not evaluate the quality of services provided to clients. This is not indicative of this financial advisor's future performance.

The Forbes "Top Wealth Advisors" award details for the following years: 2023 award announced February 2023, data as of 9/30/2022; 2022 award announced February 2022, data as of 9/30/21. Forbes "Best-in-State Wealth Advisors" award details for the following years: 2026 award was announced April 2026, data as of 6/30/2025; 2025 award announced April 2025, data as of 6/30/2024; 2023 award announced April 2023, data as of 6/30/22; 2022 award announced April 2022, data as of 6/30/21. These awards were developed by SHOOK Research and is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC and not indicative of future performance or representative of any one client's experience. The financial advisor does not pay a fee to be considered for or to receive this award. This award does not evaluate the quality of services provided to clients. This is not indicative of this financial advisor's future performance. For more information: [www.SHOOKresearch.com](http://www.SHOOKresearch.com).

# Meet our team

**Leslie A. Lauer, CFP®, CEPA®, ChFC®**  
**Managing Director – Private Wealth Advisor**  
**Senior Portfolio Manager – Portfolio Focus**

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Leslie is a leader in the wealth management industry for business owners and exceptional families. She has dedicated her career to advising owners on their succession options, including employee stock ownership plans (ESOPs). Today, as a multi-credentialed member of The ESOP Group with a diverse professional career in the ESOP industry, Leslie is

well qualified to assist owners on the nuances, benefits and challenges of selling their business to their employees. ESOP sustainability and investment consulting post-implementation are also at the core of her team's service offering to business owners and the companies they operate.

With more than 35 years of experience, she and her team assist clients on the various aspects of estate planning services and retirement planning, asset allocation, insurance solutions, lending and strategic philanthropy. She also advises corporate client relationships and family offices, providing them with cash management, executive compensation and captive insurance company asset management.

She has undergone rigorous training to strengthen her knowledge and proficiency in wealth management to help manage the investment, business, passion and legacy needs of sophisticated, ultra-high-net-worth clients and their families. Leslie understands the complexities of intergenerational wealth and the challenges faced by exceptional clients. She aligns their specific needs to the full suite of RBC Wealth Management capabilities to help them pursue their most important goals.

## Education

- Bachelor of Business Administration degree in finance from University of Toledo
- Passed the Series 7 and 66 exams
- Insurance licenses: life, health, variable annuity, variable life and long-term care

## Credentials

- CERTIFIED FINANCIAL PLANNER® certificant
- Certified Exit Planning Advisor
- Chartered Financial Consultant®

**Rebecca T. Glasgow, CFP®, CEPA®**  
**Managing Director – Private Wealth Advisor**  
**Senior Portfolio Manager – Portfolio Focus**

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Rebecca has spent her 20-year career in financial services advising business owners, wealthy families and ESOP-owned companies. She draws on her extensive experience in the areas of wealth and insurance planning and her prior experience in institutional asset management to build tailored solutions for her clients and their diverse needs.

Today, as a partner of The ESOP Group, Rebecca works closely with business owners and their families on business transition advice, specifically utilizing employee stock ownership plans (ESOPs) as a liquidity and ownership transfer tool. In addition to working with private business owners and their families, her team also assists ESOP-owned companies with their cash management and company sustainability challenges.

Rebecca is a frequent speaker on business owner liquidity and transition options, ESOPs and Section 1042 tax deferral (a planning tool for which her team is most well-known). Rebecca is the chairman of the finance committee for the ESOP Association, as well as a chapter officer for the Southeast Chapter.

Rebecca loves to ski and travel, is a fair-weather golfer and enjoys spending time with her family on Cape Cod in the summer.

## Education

- Bachelor of Arts degree in economics from Cornell University
- Passed the Series 7 and 66 exams
- Insurance licenses: life, health, variable annuity, variable life and long-term care

## Credentials

- CERTIFIED FINANCIAL PLANNER® certificant
- Certified Exit Planning Advisor

**Curt Rubinas, CEPA®**

**Managing Director – Private Wealth Advisor  
Senior Portfolio Manager – Portfolio Focus**

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For more than two decades Curt has utilized his diverse experience in wealth management to serve the needs of highly successful business owners and their families.

His career began on a Merrill Lynch trading floor in New York—sitting at the cross section of options, futures, commodity and currency trading where he built his investment

foundation. Curt would later combine that knowledge with his background in economics to develop investment solutions for wealthy investors. While living in both New York and San Francisco, he worked with highly successful clients and institutions to build strategies designed to their specific needs. However, his life changed when he moved to Atlanta and started working more exclusively with business owners and family offices. His love for problem solving was a natural fit to help these clients navigate some of life's more difficult financial decisions.

Curt joined The ESOP Group in 2014, and soon became a private wealth advisor and consultant for family office clients. He and his team are qualified to assist on all aspects of their clients' financial lives, including asset management, tax considerations, estate planning services, insurance solutions, lending and philanthropy. The team also provides advice to corporate clients in areas such as cash management, repurchase obligation, executive compensation and captive insurance company asset management.

Curt is an active member of the ESOP Association as well as a member of the finance committee and speaks at conferences nationwide. He has a Bachelor of Arts degree in economics from Vanderbilt University.

His personal interests include golf, tennis and spending time with his family.

**Education**

- Bachelor of Arts degree in economics from Vanderbilt University
- Passed the Series 7 and 66 exams
- Insurance licenses: life, health, variable annuity, variable life and long-term care

**Credentials**

- Certified Exit Planning Advisor

**Kurt S. Hirshman, CFA®**

**Vice President – Senior Financial Associate**

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Kurt focuses on portfolio management, cash flow analysis, qualified replacement securities implementation and wealth transfer through estate planning services, insurance, liability and charitable planning services. He focuses on creating customized financial models that illustrate the cash flows of ESOP transactions and available

alternatives. He also designs personalized plans to help clients reach their goals, whether that is through income generation, asset/liability management, asset allocation to match their risk tolerance or hedging portfolios against market risk.

Kurt joined RBC Wealth Management in 2023. Prior to that, Kurt was with UBS for more than two decades. He is an active member in the Atlanta Society of Finance and Investment Professionals.

Kurt's interests include history, sports, travel, reading and spending time with his family.

**Education**

- Master of Science degree in personal financial planning from Georgia State University
- Bachelor of Business Administration degree from Oglethorpe University
- Passed the Series 7 and 66 exams

**Credentials**

- Chartered Financial Analyst®

# Meet our team

## **Catherine A. Mericka, CFP®, CEPA®, CRPC®** **Vice President – Senior Financial Associate**

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Catherine joined RBC Wealth Management in 2023. Prior to that she had been with UBS since 2012. During her time at UBS, she held roles in the investment bank in Sydney, Australia, in wealth management in New York City and as a senior wealth strategy associate in Atlanta. Catherine is committed to helping clients simplify the complexity in their lives and focus

on what's most important. She provides insight on a customized wealth advisory approach, including wealth management planning, family wealth education, multigenerational wealth transfer, asset allocation and exit planning.

Prior to joining The ESOP Group, Catherine was selected by UBS Wealth Management to join the firm's highly competitive intergenerational advisor program (IGAP), a three-year analyst program. Through that program, Catherine developed strong skill sets in wealth planning, investment management and bespoke multigenerational family solutions.

Catherine is an active member of the ESOP Association. She is an avid adventure traveler, aspiring "foodie" and snow skier. Catherine is also an active supporter of her church, North Point Ministries, and contributor to First Love International Ministries—an orphan sponsorship program providing educational and physical help to underprivileged and displaced children in Nairobi, Kenya.

### **Education**

- Bachelor of Arts degree in finance from Auburn University
- Passed the Series 7 and 66 exams
- Insurance licenses: life, health, variable annuity, variable life and long-term care

### **Credentials**

- CERTIFIED FINANCIAL PLANNER® certificant
- Certified Exit Planning Advisor
- Chartered Retirement Planning Counselor<sup>SM</sup>

## **Andrew T. Becket, CAIA®** **Associate Vice President – Senior Financial Associate**

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Andrew joined RBC Wealth Management in 2023 and has over 13 years of experience advising private clients on investment strategy. He began his finance career at Sagent Wealth Management, a small RIA in Newport Beach, California, where he advised families on asset allocation, manager selection and general financial planning. In 2013, Andrew

joined Aspiriant, LLC, a nationally renowned multi-family office based in Los Angeles, California, where he spent close to a decade as a manager of investment advisory. While working in Aspiriant's family office solutions group, Andrew helped ultra-high-net-worth families implement bespoke financial solutions and worked with them to manage and understand the intersection of complex investment management and multi-generational estate planning. Andrew has experience in private and alternative investments, hedging strategies and concentrated stock management.

In 2023, after a short stint at Laguna Wealth Advisors, another RIA where he worked to help smaller clients access alternative investments traditionally only available to accredited investor, Andrew moved to Atlanta and joined The ESOP Group. He wanted to support, learn from and grow with a team that shared his values around client service, intellectual honesty and pragmatic advice. Andrew believes that the complex answer is not always the right one and strives to distill esoteric investment solutions into a format digestible to clients so that they are better armed to make effective decisions.

Andrew loves the outdoors, weekend road trips, camping with friends (and his dog, Sugar) and playing pickleball.

### **Education**

- Master of Business Administration and a finance concentration from Pepperdine University
- Bachelor of Science degree in business management from Pepperdine University
- Passed the Series 7, 63 and 65 exams

### **Credential**

- Chartered Alternative Investment Analyst

**Dana D. Breland**

**Associate Vice President – Senior Business Associate**

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Dana focuses on client service and administration.

Dana joined RBC Wealth Management in 2023; prior to that she had been with UBS since 1993. She attended the University of Georgia. Dana volunteers with the Juvenile Diabetes Research Foundation. Her personal interests include travel and cooking.

**Education**

- University of Georgia
- Passed the Series 7 and 63 exams

**Christy H. Dryden, CEPA®**

**Investment Associate**

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Christy focuses on client service and marketing.

Christy joined RBC Wealth Management in 2023, joined The ESOP Group in 2018 and has over 15 years of marketing experience and event coordination. She provides support for the team’s marketing needs and assists with client service.

Christy earned her Bachelor of Science degree in family and consumer sciences from the University of Georgia.

**Education**

- University of Georgia, Bachelor of Science degree in family and consumer sciences
- Passed the Series 7 and 66 exams

**Credential**

- Certified Exit Planning Advisor

**Dianna M. Moore**

**Associate Vice President – Senior Business Associate**

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Dianna focuses on client service and administration.

Dianna joined RBC Wealth Management in 2023. Prior to that she had been at UBS since 2008 and has over 25 years of experience in the financial services industry. She graduated from Sinclair College. Her personal interests include travel and gardening.

**Education**

- Sinclair College
- Passed the Series 7, 63 and 66 exams

**Rebecca L. Leichter**

**Client Associate**

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Becky focuses on client service, team administration and marketing.

Becky joined RBC Wealth Management in 2023 and joined The ESOP Group in June of 2022. Prior to that, she was a payroll specialist at ADP. Becky earned her bachelor’s degree in finance from the State University of New York at Fredonia.

**Education**

- Bachelor’s degree in finance from the State University of New York at Fredonia

## The ESOP Group

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**Wealth  
Management**

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