North Carolina
Department of State Treasurer

Treasurer Dale R. Folwell, CPA

Financial Operations Division

Ted Brinn
Interim -Chief Financial Officer
919-814-3907

Joan Fontes
Deputy Director
919-814-3898

Paul Palermo
Statewide Accounting Manager
919-814-3899

Derek Gee
Accountant, SRP
919-814-3880

Communications

Frank Lester
Deputy Treasurer
Communications/ Government Affairs
919-814-3811

Christy Farrelly
Communications Manager, RSD
919-814-3830

Zora Falkowski
Communications Officer, SRP
919-814-3827

Retirement Systems Division

Tom Causey
Executive Director, RSD
919-814-4195

Jeff Hancock
Director, SRP
919-814-4176

Patti Hall
Administrative Assistant, SRP
919-814-4198

Kristin Merrick
Operations Analyst, SRP
919-814-4182

Alan Jaquith
Compliance Officer, SRP
919-814-4179

Investment Management Division

Chris Morris & Jeff Smith
Chief Investment Officers

Kris Byrd
Portfolio Manager
SRP Investments
919-814-4350

Legal Services Division

Ben Garner
General Counsel
919-814-3821

Reid Chisholm
Assistant General Counsel, SRP
919-814-3843

North Carolina Total Retirement Plans
401k | 457 | 403b

Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

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