RESONATE
PRIVATE WEALTH MANAGEMENT
of
RAYMOND JAMES

Pictured left to right:

Fred M. Asfoury, CFP®, MBA – Senior Vice President, Wealth Management

Lisa L. Workman, AAMS® – Financial Advisor

Panthini Patel – Senior Client Relationship Associate

Will Parsons – Financial Advisor

Delissa Hite – Senior Client Relationship Associate

Elizabeth H. Sawyers – Senior Client Relationship Associate

Christopher S. Johnson – Senior Vice President, Wealth Management

WE WELCOME THE OPPORTUNITY TO SERVE AS YOUR TRUSTED FINANCIAL PARTNER

CHRIS JOHNSON

Senior Vice President,
Wealth Management
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Chris applies over 30 years of industry experience in advising clients on financial matters, from wealth management to retirement and estate planning. He enjoys building strong relationships with clients and their families and develops tailored strategies to help them pursue their objectives.

He specializes in helping executives navigate compensation plans, stock options and 10b5-1 trading plans, and in helping business owners with family governance and succession planning.

After attending Penn State Behrend and earning a B.A. from Mercyhurst College, Chris began his career as a financial advisor in 1989 with Paine Webber (now UBS) in Erie, Pennsylvania. In 1997 he joined Merrill Lynch and met his business partner, Fred Asfoury, CFP®, MBA. Chris and Fred joined Raymond James in 2019, drawn by the firm's comprehensive resources.

Giving to the community is important to Chris. The charitable organizations he serves include The Frankie Lemmon School and Developmental Center and The Caring Community Foundation. He also offers his support to the Johnson Shaw Stereoscopic Museum, the TJ Martell Foundation, the SPCA of Wake County, and the North Carolina Symphony and Carolina Ballet. He lives in Cary, NC, where he attends St. Michael's Church. His daughter, Lily graduated with honors from Boston University. Chris enjoys exercising, playing advanced level squash and pickleball.

FRED ASFOURY, CFP®, MBA

Senior Vice President,
Wealth Management
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For nearly 30 years, Fred has been passionate about helping people make smart financial decisions so that they can reach the goals that matter most to them. He takes the time to listen, then he and his team develop personalized strategies for risk management, estate planning, asset management, and wealth protection—always with a focus on their clients' best interests.

As a Certified Financial Planner™ professional, Fred is committed to following a fiduciary standard of care on advisory accounts, and acting in the best interests of each client. He works with business owners, corporate executives, and retirees on a range of financial planning services, including investment planning, concentrated position management, charitable giving strategies, insurance, trusts, lending, and risk management. His background in engineering and finance (MBA, Rochester Institute of Technology) gives him a unique way of blending numbers-driven analysis with practical, real-world advice.

Fred started his career at Merrill Lynch in 1997, where he met his business partner, Chris Johnson. Together, they joined Raymond James in 2019.

Outside of the office, it is important for Fred to give back to the community through The Peak Church and other charitable organizations that he is involved with. Fred and his wife, Christine, have three adult children—Jonathan, Michael, and Jessica, and enjoy biking, hiking, and spending time in Emerald Isle and the North Carolina mountains.

LISA WORKMAN, AAMS™

Financial Advisor
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With over 35 years of experience in the financial services industry, Lisa is dedicated to guiding clients toward financial success through thoughtful and comprehensive wealth management strategies tailored to their unique, lifelong goals. As an Accredited Asset Management Specialist™ (AAMS™), she follows a fiduciary standard of care for advisory clients, helping them through retirement planning, education funding, legacy building, investment portfolio management, and tax-efficient income and estate strategies.

Lisa began her career as a municipal bond and mutual fund trader after earning her bachelor's degree in Business Administration from the University of North Carolina at Chapel Hill. She later transitioned into client services and in 2011, was promoted to a financial advisory role. In 2015, she joined Chris Johnson and Fred Asfoury's team, moving with them to Raymond James in 2019. Her commitment to lifelong learning and always doing what is in her clients' best interests led her to earn the AAMS™ designation.

In her personal time Lisa is actively involved with Richland Creek Community Church and also volunteers with other faith-based charitable organizations. She enjoys reading, taking long walks, traveling, and spending quality time with her husband, their three grown children, extended family, and friends.

WILL PARSONS

Financial Advisor
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Alongside the Resonate team, Will draws on more than 130 years of combined experience to deliver personalized financial planning strategies that reflect each client's unique goals and values. He takes pride in building strong relationships with clients and their families, ensuring his advice is both thoughtful and relevant.

Will's passion for economics and investing began early and was shaped by years of research into financial markets, monetary policy, and financial literacy. A nationally ranked policy debater, he earned collegiate scholarship offers and completed a published research thesis on the Federal Reserve's crisis response capabilities while studying at Liberty University. During college, Will interned with the Resonate Private Wealth Management team, gaining hands-on experience in investment strategy and client service. He graduated with dual bachelor's degrees in Economics and Finance from Liberty's Honors College.

Originally from Gray's Creek, NC, Will now resides in Apex where he is actively involved in the local community and volunteers with Apex Baptist Church. Outside of work, he enjoys making music—singing, playing guitar, and piano—and staying active through hiking, weightlifting, and a variety of sports including golf, tennis, basketball, pickleball, and volleyball.

PANTHINI PATEL

Senior Client Relationship Associate
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Panthini is an experienced financial services professional with over 19 years of combined experience in the financial industry and retail management. She specializes in business operations, financial account servicing, client relationship management, and process improvement. Panthini is also known for her attention to detail and dedication to delivering exceptional client experiences. She holds a bachelor's degree in Human Resources from the University of Phoenix and is currently preparing for the Series 7 license to broaden her capabilities and better serve clients. Outside of work, Panthini enjoys shopping, playing badminton, spending quality time with her family, relaxing at the beach, and traveling with her husband.

DELISSA HITE

Senior Client Relationship Associate
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Throughout her combined 20 years in financial & insurance services, it has often been noted that you can hear Delissa's smile through the phone. She has continually differentiated herself by building deep client relationships, allowing her to anticipate and exceed clients' expectations. Delissa's passion for serving clients is exceeded only by her passion for her family. A native of Raleigh, NC, Delissa lives in Wendell with her husband, Donte and their son, Cason. She volunteers her time on the Fearless & Free Women's Ministry uplifting and supporting other women at World Overcomers Church in Durham.

BETH SAWYERS

Senior Client Relationship Associate

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With nearly 20 years of experience, Beth has been a cornerstone of our client services team, expertly managing every administrative aspect with care and precision. She truly enjoys the lasting relationships she has built with both clients and colleagues alike. Beth is gradually winding down her time with our team - working part-time hours and filling in where needed. She looks forward to spending more of her time traveling with her husband, Terry, and cherishing moments with family and friends. Most of all, Beth is excited to spend more time with her grandchildren - watching them grow, thrive, and discover their place in this world.

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