



JIMMY STAFFORD, CFA

Managing Director Head of Distribution and Client Service

- MBA, Washington University in St. Louis
- BS, Indiana University
- 26 Years Industry Experience

Prior to joining the ?rm in 2007, Mr. Sta?ord was a product manager with Bank of America, responsible for product development and marketing of the bank's separately managed account platform for institutional clients. Previously, Mr. Sta?ord was an analyst at Summit Strategies Group and served various roles at Morningstar, Inc.



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