



## 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 firm in 2007, Mr. Stafford 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. Stafford was an analyst at Summit Strategies Group and served various roles at Morningstar, Inc.



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