

Kevin Mahoney



Kevin Mahoney - CIMA[®], Wealth Management Advisor, Accredited Investment Fiduciary Analyst[®], has 20 years of experience in the financial services industry at Merrill Lynch. His areas of expertise include 401(k) services, qualified and non-qualified retirement plans, liability driven investing, and business services. Kevin holds a B.A. in History and Economics from Fordham University is a Wealth Management Advisor (WMA) and has achieved the Certified Investment Management Analyst (CIMA) designation, as recognized by the Investment Management Consultants Association (IMCA). Kevin has also received the Accredited Investment Fiduciary Analyst[®] Designation through the Center for Fiduciary Studies, which teaches fiduciary standards of care and investment best practices designed for trustees and investment professionals.

Kevin has been recognized as an industry leader by PlanSponsor Magazine, The American Society of Pension Professionals & Actuaries and the 401(k)Wire. He is a frequent speaker at industry conferences. Kevin is on the Board of Directors at Meals on Wheels in Rockland County, NY and is a member of the Investment Management Consultants Association.