



CONFERENCE

APRIL
25-27

20 X 18

SAN DIEGO
CALIFORNIA

HILTON SAN DIEGO BAYFRONT

Diana F. Jordan, AIFA®

Director

Client Experience



Diana Jordan is the Director of Client Experience for Unified Trust. Jordan joins Unified Trust most recently from Sikich LLP, where she was Partner in Charge of Wealth Management and Retirement Plan Services. Prior to that Jordan spent time as a Financial Advisor with Morgan Stanley.

She is responsible for developing and leading the execution of the strategic business initiatives namely client satisfaction, retention and growth in the retirement plan space. Jordan works closely with independent retirement plan advisors that have plans with Unified Trust to help them further enhance the services they provide to plan sponsors, as well as being a resource to assist with servicing the plans.