



Keith “Sunny” Loveland has been active in financial services for over 30 years. His clients have included accounting firms, banks, broker-dealers, insurance companies, investment advisers, and trust companies. Sunny has worked inside firms – as a mutual fund money manager, chairman of investment committees, and as chief legal and compliance officer.

Sunny has passed Series 3, 4, 5, 7, 8, 15, 24, 27, 53, 63, 65, and 66 – and is a 2001 graduate of the AIFA® program. He has been a member of the Financial Planning Association since 1983.

Sunny serves as a subject matter expert for the North American Securities Administrators Association – assisting with investment adviser qualifications issues.

Loveland Consulting provides compliance consulting and fiduciary audits for financial services firms, among other services.