



Kevin Mahoney, Vice President, CIMA®, Wealth Management Advisor, Accredited Investment Fiduciary Analyst®

Kevin Mahoney has 19 years of experience in the financial services industry at Merrill Lynch. His areas of expertise include liability driven investing, business services, cash management, lines of credit, retirement plans and 401(k) 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 is on the Board of Directors at Meals on Wheels in Rockland County, NY and is a member of the Investment Management Consultants Association.



Ward Mayer, CFP®, CIMA®, AIF®, AWMA®

Ward Mayer is a Managing Director and financial advisor with Morgan Keegan & Company Inc. in Memphis, TN. He works with high net worth individuals and Retirement 401k accounts. He has been with Morgan Keegan for all of his 22 year career in the financial industry. He serves on the firm's Retail Products Committee and has been a member of the firm's Chairman's Club for nine consecutive years, including the 2004 Master Circle. He was named one of Registered Rep. Magazine's Outstanding Brokers of 2005, and chosen to participate in the Barron's Winner Circle in 2007 at their Best Practices Summit in New York. He attended the University of Memphis and received a BS in Accounting from the Fogelman School of Business. Ward serves on the Board of Directors and Treasurer of the Metropolitan Inter-faith Association of Memphis and is the past President of the Board of the Memphis-Shelby County Humane Society.