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TODD WALKER

APMA®



POSITION AND EXPERIENCE

Senior Portfolio Manager at Hutchinson Family Offices, a multi-client family office managing and overseeing high net-worth family's wealth. With over a decade of experience as a financial advisor, he works with clients to diligently pursue their personal planning and wealth goals.

Works closely with the team putting into action the recommendations of the firm's planning and investment strategies. Focuses on building strong relationships with clients and delivering quality solutions while providing excellent service. Responsible for the day-to-day operations and management of all portfolios. Also serves in a key leadership role of the firm's Investment Committee by leading the strategy for client's investments as it relates to foreseeable market conditions and the protection of principle during environments with heightened volatility.

PROFESSIONAL CERTIFICATIONS AND REGISTRATIONS

- APMA®: Accredited Portfolio Management AdvisorSM, 2022
- Series 7 Registered: General Securities Representative, The Strategic Financial Alliance, Inc., (SFA)
- Series 63 Registered: Uniform Securities Agent, The Strategic Financial Alliance, Inc., (SFA)
- Series 65 Registered: Uniform Investment Adviser, The Strategic Financial Alliance, Inc., (SFA)

EDUCATION

- Bachelor of Science, Management and Economics
 - North Carolina State University

PROFESSIONAL ORGANIZATIONS

- Member of Financial Industry Regulatory Authority (FINRA)
- Registered Representative of The Strategic Financial Alliance, Inc., (SFA)
- Investment Adviser Representative of Strategic Blueprint
- Member of the board of directors for the Petty Family Foundation