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Kevin is responsible for portfolio oversight, construction and administration. He works closely with Summit's investment committee and our custodial partners to ensure allocations and portfolio objectives are aligned and on track for long term success.

Kevin began his career in 2003 in Huntington Bank's Trust and Asset Management Department where he worked for 14 years. In 2017 he became Director of Investment Operations for Wealthstone, an RIA based in Columbus OH.

He attended Otterbein College where he received a Bachelor's degree in Accounting. He received his Master of Business Administration with a focus in Finance from Franklin University. Kevin is also a CPA and CFA® Charter holder.

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