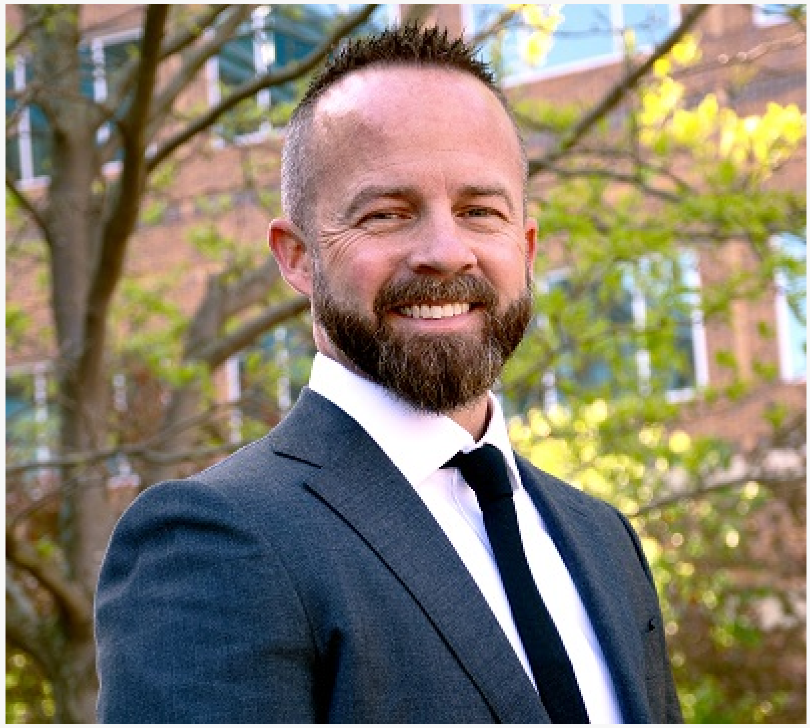
ChangePath Appoints Kirk Stewart, Financial Services Industry Veteran to Senior Vice President, Sales

Distinguished new hire has record of building wealth management teams.



Kirk Stewart, Senior Vice President, Sales of ChangePath

LEAWOOD, KS, UNITED STATES, June 15, 2021 /EINPresswire.com/ -- LEAWOOD, KAN. (May XX, 2021) — ChangePath, a boutique SEC Registered Investment Advisory firm, is pleased to announce the addition of Kirk Stewart as Senior Vice President, Sales. In his new role, Kirk will focus on continued growth, expansion of services and improved adviser experiences.

Kirk's ability to identify challenges, uncover business opportunities and develop strategic initiatives that align with the firm's goals are crucial to help advisers capitalize on missed opportunities. With his depth of experience coupled with cohesive synergies of wealth management, risk management, marketing and leading technology stack, advisers can gain hours in their days and accelerate revenue-generating activity.

"He's a proven-business consultant and conduit for growth-oriented advisers to shore-up voids and breakthrough growth barriers. As we continue to aid expanding securities-focused advisers, his consultative capacity will be instrumental in the facilitation of strategies to help our advisers reach milestones," Marty Pfannenstiel, J.D., President of ChangePath.

Kirk's tenure with Security Benefit, Ivy Investments, and most recently Advisors Excel provided a broad perspective making him invaluable to ChangePath advisers. For two decades, he's taken a commoditized investment offering, infused ancillary resources and has consistently helped firms expedite success.

ChangePath, LLC, an Investment Advisory Firm

As our industry continues to grow through consolidation, unintentional conflicts are imposed by proprietary products and challenge many advisers' abilities to work in their client's best interests. ChangePath offers a broad selection of financial services and robust technology to meet best interests. The entrepreneurial experience is enhanced by the infusion of human capital and at-cost marketing designed for experienced wealth managers.
About ChangePath

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>
> *Marty Pfannenstiel, JD*

At ChangePath we deliver technology-driven wealth management tools alongside high-touch consultation to create firm efficiencies for independent investment adviser representatives, sub-advisors and solicitors. ChangePath's vertically integrated wealth management services coupled with industry-leading marketing helps entrepreneurial wealth managers navigate increasingly dynamic and complex needs. ChangePath is an SEC Registered Investment Advisory firm that delivers an adviser-centric experience empowering financial firms across the U.S. For more information, visit: www.changepath.com/advisor or call 888.798.2360.

Kirk and his family reside in Lawrence, Kan and is a Washburn University graduate.
Advisory Services offered through Change Path, LLC an Investment Advisor.

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