

# ChangePath Appoints Terek Wilson as Director of Business Development

*ChangePath outpaces many U.S. Registered Investment Advisory firms growing 146% annually, prompting business development expansion.*

LEAWOOD, KS, UNITED STATES,  
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EINPresswire.com/ -- Midwest Registered Investment Advisory (RIA) firm grows 146% annually, prompting business development expansion.

Joining the business development team is [Terek Wilson](#). He's integral in leading strategic, operational, and business development for [ChangePath](#) advisers and will continue the momentum building the past two years.

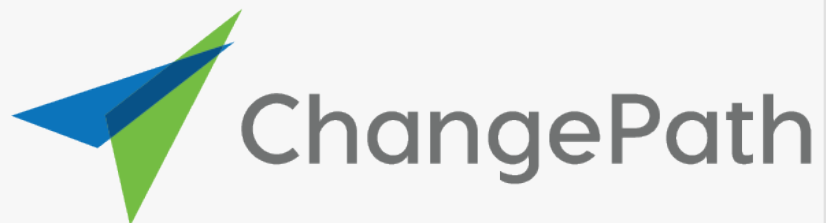
Terek joins ChangePath with 12 years of advisory growth focus, most recently as Senior Business Development Consultant at USA Financial and Wholesaler at Allstate in the Midwest region.

Previously, Terek implemented growth-focused programs and investor education. He has a wealth of experience coaching advisers on strategies that align with a more holistic approach. Much of Terek's career has been helping advisers and their clients create more predictable retirement experiences.

"Our growth over the past two years is significant. We're actively coaching advisers on new client-acquisition strategies and gathering additional client wallet share," said [Marty Pfannenstiel](#), President of ChangePath. "The growth is also a direct result of extensive offerings that have been tailored to help independent advisers succeed. With our leading technology stack, prospecting



Terek Wilson, MBA, FSCP



ChangePath, LLC, an Investment Advisory Firm



I help advisers take their practices to full-functioning, scalable businesses with “build processes,” to infuse better client experiences that allow for a natural business-development flow.”

*Terek Wilson, Director of Business Development*

tools and advanced digital marketing team, our advisers have a distinct competitive advantage.”

“I’m excited to help continue the momentum of ChangePath and its advisers,” says Terek Wilson, Director of Business Development. “Plus, my diverse experience will be hugely beneficial to our ChangePath advisers.”

ChangePath believes a successful RIA firm provides more than investment services. It should also include comprehensive adviser development and growth systems. With Terek’s extensive background in appointment-process

coaching and growth-oriented initiatives, these notable skills translate into significant value-adds for ChangePath advisers.

Terek holds his Bachelor of Science in information systems and a Master of Business Administration from Pittsburg State University. He holds his Series 6, 7, 26, 51, 63, 65 securities licenses as well as his life, accident and health insurance licenses.

#### About ChangePath

At ChangePath, we deliver technology-driven wealth management tools alongside high-touch consultation to create firm efficiencies for independent investment adviser representatives, sub-advisers 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](http://www.changepath.com/advisor) or call 888.798.2360.

Advisory Services offered through Change Path, LLC an Investment Adviser.

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