Avior Wealth and Champion Capital Research Stakeholders Win with Strategic Alliance

On January 1, 2024, CCR Merged Their Institutional Services with Avior, Creating Added Security for Their Clients, While Expanding Avior's Reach to a New Market

OMAHA, NE, UNITED STATES, January 2, 2024 /EINPresswire.com/ -- Avior Wealth Management, LLC ("Avior"), proudly announces a transformative step in its growth strategy with the successful merger with Champion Capital Research ("CCR"), a Houston-based fiduciary investment management firm.

Avior primary logo with identity statement

The merger marks a strategic alliance between two firms sharing a commitment to the highest standards of client service, investment philosophy, and integrity. CCR's founding principles closely align with those of Avior, making it an ideal partner for this strategic move forward.

> While we kept our effort to find a partner confidential, our due diligence has been going on for nearly two years. I am very confident in the direction we are going."
>
> *Mary Kathryn Campion, Ph.D., CFA®, AIFA®*

Interested in partnering with Avior? Learn more here: [MeetAvior]

About Champion Capital Research (CCR):

Mary Kathryn Campion, Ph.D., CFA®, AIFA®, founded CCR, a fee-only fiduciary investment management firm, recognized by Avior for its dedication to delivering exceptional financial solutions to institutional and private clients. Dr. Campion will be joining Avior as its first Director of Institutional Portfolio Management. Avior is thrilled to welcome Dr. Campion and her team, seeing them as an invaluable addition to Avior.

Beyond her pivotal role in shaping investment strategies, Dr. Campion has demonstrated passionate engagement in knowledge-sharing initiatives. Her dedication extends to delivering lectures and imparting expertise in economics, finance, equity and fixed-income strategies, portfolio management, and risk management at prestigious universities and professional institutions across the world.


Mary Kathryn Campion, Ph.D., CFA®, AIFA®

Since 2007, Dr. Campion has been a dedicated adjunct faculty member for Broadridge Financial, contributing her wealth of experience to educational endeavors. Notably, she authored and continues to lead the instruction of the Texas public fund Certified Trustee Training curriculum. Dr. Campion's multifaceted contributions underscore her unwavering commitment to advancing education and excellence in fiduciary practices.

This aligns seamlessly with Avior's vision for enriching the financial understanding of its clients and the broader community. Avior looks forward to integrating Dr. Campion's wealth of knowledge and dedication into its team.

Enhanced Offerings to Clients:

According to Dr. Campion, "This move has the added benefit of protecting our clients by adding a rich and deep team of traders, operations personnel, wealth managers, and a team of executives. Currently, Avior has over one hundred employees with offices around the country. While we kept our effort to find a partner confidential, our due diligence has been going on for nearly two years. I am very confident in the direction we are going."

By combining Avior's and CCR's research, analyses, data, and resources, clients will experience an enriched value proposition. This merger empowers Avior and CCR to deliver more robust strategic and tactical portfolio investment strategies, predictable retirement income solutions, and comprehensive tax and estate planning services – all of which will be provided under the Avior brand.

2024 is looking bright, as Avior continues to shape its future by planning with intention.

About Avior Wealth Management, LLC:

Avior Wealth Management, LLC, formerly Nelson, Van Denburg & Campbell Wealth Management Group, LLC, is a SEC Registered Investment Advisor that offers financial planning and investment management services to retail and institutional clients across the United States. Avior Wealth Management, LLC and its predecessor was formed in 2008 to offer clients a holistic approach to their investments, financial planning, and wealth management. With offices in eight states, we offer clients a team approach to their financial needs. Please note, investments are not guaranteed and subject to risk, including loss of principal invested.

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