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Prior to joining Callan in 2016, Brad worked as a client service associate at Invesco in the investment services group, where he supported investment centers in their monthly and quarterly reporting and helped with special projects. Prior to Invesco, Brad worked for the Henssler Financial Group as an intern supporting the research team.

Brad graduated from Auburn University with a BS in business administration with a major in finance. He is a holder of the right to use the Chartered Financial Analyst® designation and is a member of CFA Institute and CFA Society Atlanta. Brad has also earned the right to use the Chartered Alternative Investment Analyst designation.