

Ward Williams

Palmetto, FL • 913-485-8899 • ward@wardwilliams.us

I'm looking for a position where my work matters and I'm part of a team that makes a positive impact on our community.

Functional Skills

- Client Relationship Management: Proven ability to build long-term relationships and deliver exceptional client service to high-net-worth individuals.
- Business Development: Skilled in prospecting, lead generation, and acquisition strategies to expand client base and revenue.
- Operational Efficiency: Expertise in process optimization, team collaboration, and implementation of integrated technology solutions.
- Leadership & Mentorship: Strong record of coaching advisors and support staff to elevate performance and strengthen client engagement.
- Financial Planning & Education: Adept at simplifying complex financial concepts and guiding clients toward informed decisions.
- Portfolio Strategy & Oversight: Experienced in designing, managing, and rebalancing investment portfolios aligned with client goals and risk tolerance.

Experience

Licensed Real Estate Sales Agent

Keller Williams On the Water – Bradenton, FL

- Acquire and assist clients with buying or selling residential real estate properties.

Investment Counselor

Fisher Investments – Tampa, FL

- Gave financial advice and guidance to clients concerning their investments.
- Monitored the performance of client portfolios and recommended changes when necessary.
- Built a roster of 90 clients in 90 days.

Portfolio Manager

Foster Victor Wealth Advisors – Greenville, SC

- Conducted market research and analysis of macroeconomic factors affecting investment decisions.
- Managed an in-house growth equity model for more than \$250 million in client assets.
- Coached financial advisors regarding economics and investing, as well as individual portfolio construction, asset class allocation, and tax points.
- Enhanced technology stack through integration reduced inputs.

Consultant

The Williams Company – Overland Park, KS

- Provided advice on operational processes, business development initiatives, organizational changes, and technology optimization.
- Evaluated existing systems and processes against industry best practices for efficiency enhancement purposes.

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Strategic Partnership Driver

Butler, Lanz, and Wagler – Overland Park, KS

- Hired to advise three RIAs, and their respective founders, regarding a merger.
- Chief Operating Officer (COO) upon merger.
- Covid cancelled the merger.

Partner and Portfolio Manager

Paragon Capital Management – Overland Park, KS

- Partner for 19+ years.
- Contributed to the growth of AUM from \$100 million to over \$550 million.
- Provided leadership and guidance to team members while encouraging collaboration across departments.
- Sourced, evaluated, and implemented a comprehensive tech stack upgrade from unbundled ad hoc to integrated bundle.
- Hired research and administrative staff.
- Directly managed \$200 million in high-net-worth (HNW) relationships.

Personal Trust Officer and Portfolio Manager

UMB Trust – Kansas City, MO

- Developed and managed relationships with net worth families and individuals.
- Managed portfolios of equity and fixed income securities on a discretionary basis.
- Coordinated with other areas of the bank to promote cross-sold products and services.
- Consulted among clients and third-party professionals to envision, create, and maintain multiple Private Family Foundations.

Education and Training

- Vanderbilt University, Owen Graduate School of Business – Nashville, TN
Post Graduate Studies, MBA
- Trevecca Nazarene University – Nashville, TN
Bachelor of Arts, Business Administration — Minor: Accounting
- Baylor University – Waco, TX
Undergraduate Studies, Accounting

Certifications

- Licensed Real Estate Sales Agent (Florida)
- Series 65
- Standard Investments Essentials (SIE)