



Jeff M. Runyan
Wealth & Investment Advisor

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AREAS OF FOCUS

- Wealth Management
- Portfolio Structure & Management
- Fixed-Income Products
- Retirement Plans (Qualified & Non-Qualified)
- Investment Management Programs
- Insurance & Annuities

MISSION STATEMENT

Jeff M. Runyan is a Wealth & Investment Advisor in Beverly Hills. His focus is serving his clients with investment portfolios designed to maximally achieve their financial objectives while adhering to personal considerations including investor age, time horizon, risk tolerance, purpose for funds, tax ramifications, and other relevant economic issues.

ADVISOR PROFILE

Jeff Runyan has more than 18 years of industry and investment experience. By age 35, Jeff launched his Beverly Hills office, where he and his team serve many of the most prominent and respected families and businesses, including doctors, restaurants, and retailers, in Southern California.

Jeff's parents had successful careers in various areas of Finance & Risk Management and were instrumental in shaping his interest in the industry. Financial management paralleled with risk avoidance were nightly dinner discussion topics, thus the genesis of a career in Investment Management.

After graduating from the University of Missouri with his Bachelor of Science degree in Consumer & Family Economics, Jeff returned for a Teaching Assistantship that paid him to earn his Master of Science in the same program. In addition to those academic achievements, Jeff holds the Chartered Retirement Planning CounselorSM and Accredited Domestic Partnership AdvisorSM designations.

Those who know Jeff describe him as disciplined and focused. His dedication, mindset and adherence to goal setting, have allowed him to better serve his clients in their pursuit of investment success.

Dedicated to his community, Jeff is active in both Beverly Hills and Malibu, having served as a Board Member of The Rotary Club of Beverly Hills and the Malibu Chamber of Commerce, as well as a Board Member and existing Lifetime Member of The Friends of Greystone Mansion Beverly Hills. Jeff is an avid supporter of his alma mater and University of Missouri faculty, and is a lifetime member of The Chancellor's Fund for Excellence, a Jefferson Club member, and a multiple time recipient of the Paul Harris Fellow in Rotary International.

Jeff and his team collectively subscribe to the notion, "discipline makes the difference," whereby doing the right things persistently and habitually over long periods of time yields the best outcome. This approach has proven true for him in his business career, as well as, his endurance racing career in triathlon, marathon, and swimming. His steadfast nature has served him well in client acquisition and portfolio management over the past two decades.

FORMAL EDUCATION

- Master of Science, Consumer & Family Economics, University of Missouri
- Bachelor of Science, Consumer & Family Economics, University of Missouri
- Chartered Retirement Planning CounselorSM, CRPC[®], College for Financial Planning
- Accredited Domestic Partnership AdvisorSM, ADPA[®], College for Financial Planning

ABOUT WEDBUSH SECURITIES

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