



C. K. COOPER & COMPANY

Our Insight, Your Growth

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Adam E. Montano is a Financial Advisor of the Private Client Group for C. K. Cooper & Company, a full-service investment bank focused on providing superior and insightful research coverage to its clients; innovative investment banking solutions supported by sales and trading services; and portfolio advisory and management services for private clients.

After having worked in Customer Service and Education, Adam joined the C. K. Cooper team in 2008 in its Institutional Sales Group. Having gained experience into the inner workings of the financial markets, he moved into the Private Client Group in the fall of 2009. His driven pursuit for personal attention and wealth management, for client's financial needs is what Mr. Montano prides himself on. He continues to educate himself to better his clients' wealth in all aspects of Portfolio Management including: strategic asset allocation, tax minimization strategies, risk management, direct investments, trust services and estate planning.

Mr. Montano comes from a family of Financial Advisors; his involvement in the business dates back to his teenage years, assisting other Financial Advisors. He has two years prior experience in Investor Relations in the Bio Tech Industry.

Mr. Montano is an active member in his local community and church. He has been an active member with the Leukemia and Lymphoma Society since 2007. He also is an active tri-athlete and participates in training with other tri-athletes. Adam is passionate about bettering his community and individuals in their: health, spiritual, and financial needs.