



C. K. COOPER & COMPANY

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Chad Kessler is a Financial Advisor of the Private Client Group of 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.

Mr. Kessler joined the firm in January of 2007 to further pursue his passion for creating lasting relationships through comprehensive wealth management. His clients have come to rely on his vast experience in all aspects of portfolio management including: strategic asset allocation, tax-minimization strategies, risk management, direct investments, trust services and estate planning. He enjoys a specialization in the Oil & Gas sector and Options strategies.

Prior to joining the firm, Mr. Kessler was a financial consultant for AXA Equitable where he focused on retirement planning and earned the respect of hundreds of clients with his knowledge of qualified plans management and pension maximization strategies.

Mr. Kessler attended Chapman University where he graduated with a Bachelor of Science in Business Administration with an emphasis in management and marketing. He holds Series 7 & 66 licenses as well as the California State Insurance license.

As a lifelong resident of Southern California, Mr. Kessler can be found after work hours perfecting his golf game and spending time with his wife Alina. He strongly believes in making a difference both in business and his community and is proud to serve as a member of the Chapman University Endowment Council as well as Vice President on the Board of Directors for the ALS Association of Orange County.