



C. K. COOPER & COMPANY

Our Insight, Your Growth

**KEVIN WAGNER
FINANCIAL ADVISOR
PRIVATE CLIENT GROUP**

Telephone: (949) 477-9300 ext. 2062

Facsimile: (949) 477-9211

E-Mail: kwagner@ckcooper.com



Kevin Wagner 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. Wagner joined the firm in December of 2008 and brings with him extensive experience in disciplined wealth management strategies. He is committed to meeting each client's financial goals and expectations through comprehensive planning, asset allocation, risk management and consistent portfolio review.

Prior to joining the Private Client Group at C. K. Cooper and Company, Mr. Wagner was a financial consultant for Wamu Investments where he worked directly with both business and private banking clients. He has experience managing over \$50 million in assets specializing in wealth management, insurance services and retirement planning. His employment history also includes working as a financial advisor for Merrill Lynch.

Mr. Wagner graduated from California State University where he earned a Bachelor degree in Business Administration with a concentration in accounting and information management. He holds series 7 and 66 licenses as well as the California State Insurance license. In his spare time, he enjoys fishing and golfing.