

Jeff Maynard, AIF®

Partner, Wealth Advisor, Carson Wealth



Location: Amarillo, TX

Retirement Plan Advisory Experience: 10

Number of Years Working with Retirement Plans in Non-Advisory Capacity: 18

Number of Plans: 75

Retirement Plan AUM: \$200 AUM

Plan Types: 401(k), 457, MEP

Partnership Thresholds/Minimums: Start-up plans with \$200 annual flow or plan assets of \$1M

“I like seeing clients make their financial plan more of a priority—when they discover there’s so much we can do today that will position them for a better tomorrow.”

Jeff is an AIF and has worked as a 3(21) fiduciary for over 10 years and in the advisor profession for nearly 20 years. He works with the Investment Committees and Trustees to ensure all fiduciary requirements are met and documented with a defined process.

Jeff oversees a team of four who work with business owners to maximize retirement plans for their employees, and conduct the education and communication around these plans. His team works with everyone from start-ups to organizations with \$300M assets with locations in over 15 states.

Whether seeing an individual or an entire company through a retirement plan, Jeff is responsive and dedicated to showing clients the highest level of care.

