

**Brian Sommers, CFA**  
Principal, Chief Investment Officer



As a Principal and Chief Investment Officer for HBKS® Wealth Advisors (HBKS®), Mr. Sommers oversees the firm's investment management processes for a distinguished group of nearly 30 investment advisory representatives. Mr. Sommers chairs the Investment Policy Committee of the firm and is instrumental in the identification, evaluation and recommendation of the investments that make up HBK's portfolios. He brings HBKS clients the expertise of more than 20 years managing a wide range of portfolios for both high net worth individuals and institutional clients.

Prior to joining HBKS in May 2014, Mr. Sommers ran the outsourced CIO service for Fusion Investment Group, where he developed the asset allocation strategies and performed manager due-diligence for three wealth management firms. He also managed Fusion's Equity Enhanced Income product, which combines individual stock portfolios with covered call writing. Prior to his work at Fusion, Mr. Sommers was the Chief Investment Officer at McKinley Carter Wealth Services, where he oversaw the formulation of investment strategies and the selection of investments for individual and institutional clients.

Over his career, Mr. Sommers has managed an impressive array of investments, including Taft-Hartley plans and endowments, and plans for foundations, corporations, individuals and public entities. He has held positions in investment consulting and client service for both institutional and high net worth clients.

Mr. Sommers holds an MBA from the University of Pittsburgh's Katz Graduate School of Business, has earned the Chartered Financial Analyst (CFA) designation and is a member of the CFA Institute and CFA Society of Pittsburgh. His community involvement includes serving on the board of the Boulder Crest Retreat for Wounded Warriors.

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[bsommers@hbkswealth.com](mailto:bsommers@hbkswealth.com)  
[www.hbkswealth.com](http://www.hbkswealth.com)

100 PINWOOD LANE, SUITE 100  
WARRENDALE, PA 15086  
PHONE: (724) 934-8200  
1-866-649-8201  
FAX: (724) 934-3762