

Scott Cross, CFA

Principal, Chief Operating Officer



As chief operating officer of HBKSTM Wealth Advisors (HBKS), Mr. Cross is responsible for the day-to-day operations of the firm, including the company's financial performance, firm policies and procedures, technology implementations, the management of nearly 50 distinguished members, and the continued compliance of the firm and its representatives with all investment advisor and broker/dealer requirements. He also has broader and more strategic responsibilities in chairing the firm's Investment Policy Committee to identify, evaluate, and recommend the investments that make up HBKS's customized client portfolios.

Mr. Cross works from a grounded perspective provided by his nearly two decades of financial services experience where he has overseen various investment practices, processes and technologies. He joined HBKS Wealth Advisors in 2006 after working with Securities America Inc. from 1998 to 2006 as the director of investment information services and leading performance reporting functions. From 1992 to 1998 he served as an actuarial specialist and consultant for the Principal Financial Group.

Mr. Cross believes that HBKS's highly credentialed and talented advisors, with their focus on long-term planning, set the firm apart from other firms seeking to advise high-net-worth individuals and families. He attributes the firm's success to its ability to leverage the various capabilities, skills and talents of its professionals to deliver customized services in a combination that supports the advancement and achievement of their clients' goals.

Mr. Cross's academic background includes a B.S. in Business Administration - Actuarial Science from the University of Nebraska-Lincoln, a Masters in Business Administration - Finance from Drake University, and has attained the Chartered Financial Analyst[®] designation, and is a member of the CFA Institute. He is also a FINRA Registered Principal (Series 24), Registered Representative (Series 7), and Investment Advisor Representative (Series 66).

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