



CANNON
FINANCIAL INSTITUTE

J. Phil Buchanan Executive Chairman, Industry Consultant

Industry Experience

- *Argent Financial Group*
- *Allen & Company*
- *Laurus Holdings*
- *SunTrust Bank*

Designations, Affiliations & Licenses

- Series 65 – Registered Investment Advisor
- Certified Financial Planner™
- Chartered Financial Consultant®
- Chartered Life Underwriter®
- Certified Wealth Strategist®

Education

- MSJ in Financial Services Compliance – Seton Hall University School of Law
- B.S. in Economics – University of Georgia

Overview

Phil Buchanan serves as Executive Chairman of the Board for Cannon Financial Institute. Phil is a highly sought wealth management expert. He has worked with major financial services firms in North America and their subsidiaries abroad as a speaker, trainer, consultant and coach. Phil delivers keynotes at industry gatherings, writes for industry publications and is frequently interviewed by the media on wealth management.

Relevant Client Experience

- Conducted merger and acquisition analysis for
 - Retail RIAs
 - Trust Firms
 - Family Office
- Successfully completed and integrated eleven (11) acquisitions
- Designed, implemented, and executed Client Management Process for
 - Retail RIAs
 - Trust Firms
 - Family Office
- Overhauled and redeployed firm branding, marketing, and client engagement culture
- Redesigned and implemented compensation systems to align behaviors with results (with monitoring process)
- Initiated third party management in the areas of
 - CRM
 - Trust accounting
 - Document management
 - Wealth aggregation
 - Insurance programs
 - Banking and Credit programs

www.cannonfinancial.com

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