

# Stoker Ostler

## Evan Nuttall is an Associate Portfolio Manager at Stoker Ostler.

Stoker Ostler is a wealth advisory firm serving more than 1,600 individuals and families, across the United States and internationally, overseeing more than \$1 billion in assets under management.

Evan Nuttall works directly with Cody Amis as an Associate Portfolio Manager. Evan is focused on enhancing the client experience by providing high levels of service and support. He plays an integral role in the daily monitoring and rebalancing of client portfolios while also acting as a liaison between clients and their custodian. He contributes to the investment policy and strategy of the firm as a member of Stoker Ostler's Investment Committee. Evan joined Stoker Ostler in 2015.

Evan has prior experience working for a Fortune 50 company where he was a member of its financial planning and analysis team. He is currently pursuing the Chartered Financial Analyst (CFA) designation. Evan received a Bachelor of Science degree in Finance from Brigham Young University, graduating magna cum laude.

Evan speaks fluent Tagalog (a language spoken in the Philippines). He enjoys a wide variety of activities such as hiking, camping, snowboarding, wakeboarding, music, serving in his church, and spending time with family and friends.



### Evan Nuttall

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Stoker Ostler helps affluent individuals and families reach their financial goals through:

- Financial Planning
- Tax Planning
- Retirement Planning
- Estate Planning
- Portfolio Management

Stoker Ostler is a member of BMO Financial Group [NYSE, TSX: BMO], one of the largest diversified financial service providers in North America.

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