MAINSTREET ADVISORS

# RICK MILTON, CFA

## MAINSTREET ADVISORS IS AN INVESTMENT ADVISORY FIRM DEDICATED TO SERVING WEALTH MANAGEMENT PROFESSIONALS WHILE HELPING CLIENTS WORK TOWARD THEIR INVESTMENT OBJECTIVES.

The firm provides portfolio management, investment research, and marketing support services. MainStreet Advisors maintains Portfolio Management Solutions to provide institutions the right tool for every client situation and to help increase efficiency. MainStreet Advisors cultivates and carefully sows the seeds of growth for fiduciaries around the country.

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RICK MILTON, CFA
MANAGING DIRECTOR AND DIRECTOR OF BUSINESS DEVELOPMENT
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Rick joined MainStreet Advisors in 2004 and serves as the firm's Director of Business Development. In this role, Rick works closely with members of the sales team to identify new business opportunities for MainStreet Advisors, and assist clients in their business development efforts. Additionally, Rick serves as a relationship manager and portfolio manager for several client relationships. He is also a member of the firm's Investment Committee which establishes investment strategy and policy.

Prior to joining MainStreet Advisors, Rick served as a Portfolio Manager at Feldman Securities Group where he was responsible for the management of individual and institutional portfolios. Rick began his career at Bank One in Chicago as an Investment Officer. He later accepted a position as a Senior Analyst in the Private Equity Valuation Group at KPMG LLP.

- University of Iowa, Finance & Economics
- Chartered Financial Analyst®
- Member of the CFA Institute
- Member of the CFA Society Chicago