

# Emmanuel Boyd

## Senior Wealth Advisor, Private Wealth Management

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### STRENGTHS

- 🔧 **Complex Planning**  
Connected retirement, liquidity, tax, estate, and charitable priorities in one clear client planning discussion.
- ♥️ **Portfolio Guidance**  
Reviewed allocation, risk, cash needs, and progress through market changes. Clients valued calm, clear explanations.
- ♥️ **Trusted Relationships**  
Structured reviews and timely follow up made difficult decisions easier for families with substantial assets.
- 👥 **Collaborative Advice**  
Coordinated with tax, estate, legal, and investment professionals so each recommendation fit broader plans.
- 🎓 **Advisor Mentoring**  
Shared practical case guidance with developing advisors. Peers sought help with discovery and investment conversations.

### SKILLS

Financial planning

Portfolio management

Wealth advice Investment strategy

Asset allocation

Retirement planning

Liquidity planning

Risk assessment Client discovery

Relationship management

Concentrated positions

Charitable planning

Multigenerational wealth

### SUMMARY

Senior Wealth Advisor and CFP® professional with 13 years guiding **High Net Worth** and **Ultra High Net Worth** families through comprehensive financial planning, investment strategy, and ongoing portfolio management. Advises households with approximately **\$5 million to \$15 million** and greater **investable assets**, addressing concentrated positions, liquidity events, retirement objectives, charitable priorities, estate considerations, and multigenerational goals. Develops individualized wealth strategies that connect portfolio decisions with broader financial priorities, risk tolerance, cash flow, and long term outcomes. Builds trusted advisory relationships through clear communication, disciplined reviews, and coordinated work with tax, estate, legal, and investment professionals. Mentors developing advisors and translates complex planning topics into practical decisions that support lasting client confidence.

### EXPERIENCE

#### Senior Wealth Advisor, Private Wealth Management

Summit Crest Private Advisory 📅 March 2022 - Present 📍 Dallas, Texas

Lead comprehensive advisory relationships for **High Net Worth** and **Ultra High Net Worth** families, guiding complex planning, portfolio decisions, and advisor development across substantial household assets.

- Guided **\$5 million to \$15 million** families through retirement and liquidity planning decisions
- Rebalanced concentrated portfolios after liquidity events, preserving goals through disciplined risk reviews
- Coordinated tax and estate professionals around integrated investment and **wealth strategies**
- Explained portfolio tradeoffs during market changes, strengthening confidence across complex households
- Mentored advisors through discovery, planning analysis, investment conversations, and case reviews

#### Wealth Advisor, Affluent Client Advisory

Redwood Harbor Wealth Management 📅 January 2019 - February 2022 📍 Plano, Texas

Managed affluent household relationships from discovery through implementation and recurring review, combining portfolio construction with retirement, cash flow, charitable, and legacy planning.

- Constructed diversified recommendations around objectives, liquidity, risk tolerance, and tax considerations
- Modeled business sale scenarios that clarified investment choices during major liquidity events
- Prepared retirement and legacy analyses, giving families a coordinated view of priorities
- Partnered with specialists and external professionals to align portfolios with estate structures
- Documented advice and follow up actions, improving continuity across recurring household reviews

#### Associate Wealth Advisor, Client Planning

Blue Mesa Financial Group 📅 June 2016 - December 2018 📍 Fort Worth, Texas

Supported comprehensive planning and portfolio service for **High Net Worth** households, progressing from analytical preparation toward ownership of defined client discussions and implementation tasks.

- Built retirement analyses covering allocation, insurance needs, reserves, and long term goals
- Prepared portfolio reviews showing allocation drift, performance, liquidity needs, and risk exposure
- Executed approved account actions with accurate documentation, suitability checks, and timely completion
- Researched investment options and summarized findings for senior advisor client meetings
- Converted technical planning details into clear explanations for increasingly independent client discussions

Tax aware planning

Advisor mentoring

## LANGUAGES

English Native

Spanish Intermediate

## MY CAREER



● Senior Wealth Advisor, Private Wealth Management at Summit Crest Private Advisory (4.6 Years)

● Wealth Advisor, Affluent Client Advisory at Redwood Harbor Wealth Management (3.1 Years)

● Associate Wealth Advisor, Client Planning at Blue Mesa Financial Group (2.5 Years)

● Financial Planning Analyst, Advisory Support at Lone Star Advisory Services (2.8 Years)

## Financial Planning Analyst, Advisory Support

Lone Star Advisory Services 📅 July 2013 - May 2016 📍 Irving, Texas

Produced planning analyses and investment review materials for advisor teams serving affluent individuals and families, establishing a foundation in fiduciary minded advice and portfolio construction.

- Reconciled investment, retirement, banking, insurance, and liability data before planning analysis
- Modeled savings and withdrawal assumptions to clarify long term funding objectives
- Prepared portfolio reports supporting discussions about positioning, risk, and progress toward goals
- Maintained planning records and action items, supporting consistent advisory team follow through
- Built foundational knowledge of confidentiality, portfolio construction, and fiduciary minded client service

## PROJECTS

### Complex Household Wealth Strategy 📅 2024

Built a coordinated planning framework for households with concentrated positions, liquidity needs, retirement goals, charitable priorities, and multigenerational considerations. Clear decisions create lasting confidence.

### Advisor Mentoring and Case Review Program 📅 2023

Created recurring case discussions focused on discovery, planning analysis, investment conversations, and relationship management. Practical coaching helped developing advisors handle complex client needs.

## LEADERSHIP & AWARDS

- Recognized as a trusted senior advisor for complex High Net Worth and Ultra High Net Worth relationships.
- Selected to mentor developing advisors on discovery, planning analysis, investment conversations, and relationship management.
- Earned sustained client confidence through clear portfolio guidance during market changes and family transitions.

## EDUCATION

### Bachelor's Degree in Finance

University of North Texas 🎓 GPA: 3.5 📅 2013 📍 Denton, Texas

**Coursework:** Financial Planning, Investment Analysis, Portfolio Management, Corporate Finance

## CERTIFICATIONS

- CERTIFIED FINANCIAL PLANNER™ professional 📅 2017
- CFP Board Continuing Education 📅 2026

## TECHNICAL SKILLS

- **Financial Planning:** Retirement planning, Cash flow planning, Goal analysis
- **Portfolio Management:** Asset allocation, Risk review, Portfolio rebalancing
- **Wealth Strategy:** Wealth advice, Liquidity planning, Legacy planning
- **Investment Analysis:** Investment strategy, Performance review, Concentrated positions
- **Client Advisory:** Client discovery, Relationship management, Client reviews
- **Tax Coordination:** Tax aware planning, Tax professionals, Tax considerations
- **Estate Coordination:** Estate planning, Estate structures, Legal professionals
- **Charitable Planning:** Charitable goals, Giving strategies, Philanthropic priorities
- **Retirement Strategy:** Retirement objectives, Withdrawal modeling, Retirement transitions
- **Professional Practice:** CFP standards, Fiduciary advice, Client confidentiality

## PROFESSIONAL AFFILIATIONS

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- CFP Board community, advancing ethical financial planning and client centered professional practice.
- Professional advisor mentoring community, sharing practical methods for complex household planning and collaboration.

## ADDITIONAL INFORMATION

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**Work Status** : Authorized to work in United States. No sponsorship required.

## REFERENCES

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AVAILABLE ON REQUEST