

Kurt C. Gerhardt, CFP®

Kurt was born in 1959. He has a Finance degree from the University of Missouri – Columbia and has earned the Certified Financial Planner™ (CFP®) designation. He has extensive business and financial service knowledge. He has worked for Mercantile Trust Company and First Interstate Bank, LTD focusing on corporate banking relationships with large regional and fortune 500 companies.

Kurt is a member of Jacksonville's Southside Business Men's Club, The Jacksonville Chamber of Commerce and is on the board of directors for the First Coast YMCA Indian Guides/Princess Program. He likes to spend time with his wife & family and enjoys all sports especially football, golf, fishing and competing in amateur IPSC competitions.

Mr. Gerhardt has been offering investment and financial advice on a percentage fee basis since January 2000. He holds the FINRA Series 7 and 66 securities designations.