

THE EXPERIENCED ADVISOR CONSULTING TEAM

www.ExperiencedAdvisorConsulting.com



Louis Poulin

Founder & Partner

Based in Atlanta, GA

- 44 years total industry experience
- Financial Advisor for 15 years
- 22 years at wirehouse UBS/PaineWebber
- 8 years at multi-channel Ameriprise
- 6 years at EF Hutton
- Leadership roles: Branch Manager/Managing Director, Regional / District Manager, Recruiting Director for Independent & W2 channels
- Consultant with PNC Bank to create the WM process for bank advisors
- Minority owner of a start-up B/D - The Pinnacle Group
- Deep international knowledge / Languages: French
- One year ranked #1 recruiter at Ameriprise and #1 recruiter at UBS
- Founder of advisor recruiting firm since 2020

Bill Gibson, CFP®, RICP®

Partner

Based in Columbus, OH

- 42 years total industry experience
- Financial Advisor for 36 of 42 years
- 18 years at wirehouses - Prudential, UBS and Morgan Stanley
- 11 years at regional firms J.C. Bradford & Co. and Legg Mason
- 13 years at multi-channel Raymond James
- Leadership roles: Sales Manager, Branch / Complex Manager, Reg'l Senior Recruiting Consultant
- Raymond James - Northern Division Complex Manager of the Year 2022
- Council memberships for RJ Trust company and RJ national complex manager advisory groups
- Founder of Kingsdale Wealth Management Partners
- Successfully transitioned book to successor in retirement