

# Biography – Jeff Rice

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## **Personal:**

I've spent my entire career in the mutual fund industry, pricing defined contribution plans for large companies at State Street Bank & Trust, analyzing mutual fund performance at Waddell & Reed Investment Management Company and providing marketing support for an assigned desk of mutual funds at Ivy Funds. I currently reside in Overland Park, KS with my two daughters, Sophia and Madelyn.



## **Client Services Specialist**

Jeff is responsible for handling non-advisory questions and concerns from clients. He handles the majority of the “behind the scenes” implementation of client requests. He may not sit in on client meetings, but he is responsible for most of the follow up and account paperwork needing completion. Jeff has a strong understanding of technical financial planning and investment management processes.

## **Professional & Community Involvement:**

- Client Services Specialist, Buttonwood Financial Group, LLC: 2015 – present
- Product Analyst, Ivy Funds: 2014 – 2015
- Senior Performance Analyst, Waddell and Reed: 2012 – 2014
- Performance Analyst, Waddell and Reed: 2006 - 2010

## **Mission: Buttonwood Financial Group, LLC**

At Buttonwood Financial Group, we believe that as wealth builds, life doesn't get simpler – it gets more complex. We simplify the financial process for families that would like to protect and grow their money. As Your Family CFO, we focus on the creation, implementation, and ongoing strategy in your financial life. We provide comprehensive tax, insurance, estate, investment, cash flow, retirement, education and business strategies – all integrated into your life and focused on your objectives.