



## **Kevin Shultis**

Registered Wealth Associate

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As a Registered Wealth Associate, Kevin Shultis is committed to providing exceptional care when managing client relationships and shows diligence when responding to their day-to-day inquiries. With the client service team in Bethesda, Kevin works collaboratively in processing paperwork, opening accounts, and tending to overall client account administration functions.

Prior to joining Seventy2 Capital, Kevin gained experience in client account management functions during his tenures at UBS and Merrill Edge. At UBS, Kevin was also a registered CSA and utilized industry tools to gain familiarity with meeting financial compliance requirements when supporting advisors and their clients. He has completed the Series 7 and 66 registrations which combined with a BS degree in Pure Mathematics and a minor in Computer Science adds a strong skillset to the team.

Originally from Hanover, PA, in his spare time Kevin can be found trail running, golfing, and hiking the Appalachian trail.