

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 Success Manager

Jeff works closely with outside vendors to ensure seamless client onboarding and continued success throughout the client lifecycle. He handles the majority of “behind the scenes” implementation of client requests, collaborating internally with Operations and Financial Advisors and externally with an array of 3rd party vendors. Jeff has a strong understanding of technical financial planning and investment management processes.

Professional & Community Involvement:

- Client Success Manager, 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.

