Zacks Investment Management

Brian Mulberry

Chief Market Strategist

Brian Mulberry is Chief Market Strategist. Brian joined Zacks Investment Management in 2017 and has 25 years of experience in the area of investment management. Brian studied at the Colorado School of Mines where he focused his studies on Geophysics. Despite his focus in the sciences, Brian was drawn to the field of finance starting in 1997. Over the last 25 years, Brian has dedicated his life guiding individuals toward retirement and protecting a portfolio against any economic backdrop.

Brian is also an expert in Behavioral Economics, the study of human behavior in economic decision making, and works closely with the investment research team at Zacks, providing his insights on key macro-economic trends; including interest rates, inflation, and economic growth indicators.

Brian possesses a broad understanding of portfolio construction utilizing mutual funds, ETFs, SMAs, Annuities, and Listed Private Equity, along with retirement plans in the DCIO space.

He currently resides in Littleton, Colorado with his wife and children, where he spends time being active, following soccer, and enjoying the mountains as much as possible.

Brian looks forward to the opportunity to work with you and your team.



FINRA Series 7 General Securities Representative

FINRA Series 63 Uniform Securities Agent State Law

FINRA Series 65 Uniform Investment Adviser Law

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Zacks
INVESTMENT MANAGEMENT

About Zacks Investment Management

We have provided wealth management services since 1992, when we helped pioneer the integration of earnings estimate analysis into the investment process. Today, we manage billions for advisors and institutions.

While we've grown quickly, one thing has remained constant: our dedication to delivering outstanding performance for our clients. Read on to discover how the results of our proprietary approach have put us among the investing industry's top rated wealth management firms.

3 Key Benefits
of Zacks Investment Management

1. Our Competitive Advantage

Global fundamental research is not simply a priority for us; it is part of what defines us and is the foundation of everything we do driving our proprietary approach to investment management. Our parent firm is Zacks Investment Research, one of the most highly regarded and largest independent research firms in the United States. Our ability to access and leverage proprietary, fundamental and quantitative financial research gives us a distinct investing advantage.

2. A Stable Management Team With a Proven Track

Once we understand your goals and needs, we can discuss our investment strategies managed by our portfolio management team. You can rest assured you're in good hands, because our portfolio managers have more than 130 combined years of financial industry experience.

3. A Comprehensive, Disciplined Investment Approach

Our performance speaks for itself. And this consistent performance is a result of a disciplined, comprehensive approach to analyzing global markets, identifying the most attractive investment categories, then choosing the best individual stocks. Over the years, we have combined our unique research capabilities with academic research to develop the proprietary stock selection models used in our investment strategies.

Past performance is no guarantee of future results. Inherent in any investment is the potential for loss.

Prospective clients and clients should not assume identical performance results to those shown would have been achieved for their account if it was invested in the Strategies during the period. Clients of the firm may receive differ- ent performance than the composite. Client performance may differ due to factors such as timing of investment(s), timing of withdrawal(s), and client-mandated investment restrictions. Wholesale, retail and institutional clients of the firm may have differing performance due to timing of trades.

Investments in the Strategies are not deposits of any bank, are not guaranteed by any bank, are not insured by FDIC or any other agency, and involve investment risks, including possible loss of the principal amount invested. Separately managed account minimums apply. Inherent in any investment is the potential for loss. Standard management fees are available on request and are described in Part 2A of Form ADV.