

Stoker Ostler

Cody R. Amis is a Senior Portfolio Manager at Stoker Ostler.

Stoker Ostler is a wealth advisory firm serving more than 600 Individuals and families, across the United States and internationally, Overseeing more than \$1 billion in assets under management.

Cody serves as a primary relationship manager and is responsible for the management of client portfolios. He helps clients identify and prioritize financial goals and establishes investment strategies to help reach those goals. He specializes in designing investment solutions that reflect client's unique circumstances and risk tolerances and integrate with other facets of their personal financial plan including income taxes, retirement, estate, and risk management needs. He has been providing wealth management for high-net-worth families and small business owners for over ten years. Cody is a member of the Stoker Ostler Investment Committee responsible for setting investment policies and strategies for the firm.

Cody is a Chartered Financial Analyst (CFA®) charterholder and a CERTIFIED FINANCIAL PLANNER™ professional. He currently serves on the Board of Directors of the Phoenix CFA Society and is a member of the CFA Institute. He received a Master of Science degree in Personal Financial Planning and a Bachelor of Business Administration degree in Finance from Texas Tech University.



Cody R. Amis, CFA, CFP®

Senior Portfolio Manager

Tel: 480.890.8088

Fax: 480.890.8770

cody.amis@stokerostler.com

4900 North Scottsdale Road, Suite 2600
Scottsdale, AZ 85251-7658

Stoker Ostler helps affluent individuals and families reach their financial goals through:

- Financial Planning
- Tax Planning
- Retirement Planning
- Estate Planning
- Portfolio Management

Stoker Ostler is a member of BMO Financial Group [NYSE, TSX: BMO], one of the largest diversified financial service providers in North America.

Stoker Ostler is a trade name used by Stoker Ostler Wealth Advisors, Inc., an SEC-registered investment advisor. BMO and BMO Financial Group are trade names used by Bank of Montreal.

CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP® in the U.S.

Investments are: **NOT FDIC INSURED – MAY LOSE VALUE – CARRY NO BANK GUARANTEE.**

©2013 BMO Financial Corp. 12-334-122

Stoker Ostler

BMO  A part of BMO Financial Group