

Stoker Ostler

Sean Lunny is a 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.

Sean serves as a primary relationship manager and oversees the management of client portfolios. He works together with clients to help identify and prioritize financial goals, and then establishes appropriate investment strategies. He specializes in designing investment solutions that reflect clients' unique circumstances and risk tolerances while integrating other facets of their personal financial plan including income taxes, retirement, estate, and risk management needs. Sean is a member of the Stoker Ostler Investment Committee, which is responsible for setting investment policies and strategies for the firm. Prior to joining Stoker Ostler, Sean worked for national and regional financial institutions in financial planning, investment advisory and securities trading capacities.

Sean is a CERTIFIED FINANCIAL PLANNER™ professional and a Level II CFA Candidate. He received a Bachelor of Science degree in Business Management from Brigham Young University, and holds a Master of Science Degree in Security Analysis and Portfolio Management from Creighton University. Sean serves on the board of directors for the children's IDEA Museum and supports local animal welfare causes. In his spare time he enjoys cycling, golfing, and running.



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

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

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