PARTNER PROFILE

Clay Kendall, CFA

Co-Founding Partner, Managing Partner

Specializing in employer-sponsored retirement plans, portfolio management, advising private businesses and high net worth investors, Clay also holds a Chartered Financial Analyst (CFA®) designation.

He has worked in the investment industry since 2003 and is Series 7, 63, & 65 registered. He graduated from the University of Arkansas with an Accounting degree and has multi-generational ties to Arkansas.

Clay began his career with Arvest bank and was quickly promoted to the Arvest Mortgage Company, focusing on hedging the bank's mortgage portfolio and interest rate risk management.

His initial success in structured finance drove him to a distinguished career in private wealth management, fiduciary retirement plan services, and led him to co-launch WealthPath Investment Advisors in 2011.

Kendall co-founded WealthPath to help individuals, families, and businesses make informed investment decisions by integrating financial solutions with personalized advice.

He also works with numerous third-party advisors nationwide, who are looking for scalable and versatile active asset allocation solutions for their clients.

Outside of work, Clay enjoys snow skiing, mountain biking, fishing, and camping with his wife and two sons. He serves on the Rogers City Council and has served on numerous non-profit boards in Arkansas.

AREAS OF FOCUS:

- Employer sponsored retirement plans
- Investment selection and model-based asset allocation
- Retirement outcomes for plan participants
- Collective investment trust management
- Custom turnkey asset management programs
- Holistic financial planning

DESIGNATION:

Chartered Financial Analyst®

EDUCATION:

University of Arkansas
Bachelor of Science in Accounting

REGISTRATIONS HELD:

- Series 7, 63, 65

CONTACT:

Rogers Office
5305 Village Parkway, #5
Rogers, AR 72758

Phone: 479-845-6220

clay@wealthpath.net
www.wealthpath.net