CANNON
FINANCIAL INSTITUTE

Lawrence T. Divers

Executive Vice President, Subject Matter Expert

Industry Experience

- *Citizens Federal Savings & Loan*
- *Wells Fargo*
- *First Interstate*

Designations, Affiliations & Licenses

- Accredited Fiduciary Investment Manager™
- Accredited Investment Fiduciary®
- Accredited Investment Fiduciary Auditor™
- Certified IRA Services Professional™
- Certified Retirement Administrator™
- Certified Retirement Counselor ®
- Certified Retirement Services Professional™
- Certified Securities Operations Professional™
- Certified Wealth Strategist®

Education

- B.A. (2) – St. Martin's College
- M.S. – Illinois State University

Overview

Larry Divers brings a comprehensive knowledge of investments, retirement plans and wealth management into each of his engagements. He consistently provides high-quality training and learning experiences, earning him top marks from his audiences time and again. Larry is a prominent fiduciary consultant, advising and training across the financial services industry. The end result of his guidance is efficient, strategic and in-depth product, marketing and sales plans. Larry's work has appeared in Trust & Estates Magazine as well as other industry publications.

Relevant Client Experience

- Developed IRA product offering for multi-state financial services firm
- Designed, developed, and delivered Investment Review and Asset Consolidation workshop for full service financial services firms specializing in government personnel
  - Established benchmarks for measuring success
  - Determined appropriated reporting systems and tools for performance tracking
  - Designed and implemented impact surveys and assessments
- Developed national education plan for international asset management firm in the areas of coordinating Retirement plan assets with estate planning
  - Types and uses of retirement vehicles (Qualified Retirement Plans, IRAs)
  - Distribution taxation options, rules and requirements of retirement vehicles within an estate plan
- Provided comprehensive consulting for expanded Retirement product offering within international asset management firm
  - Policy and procedure development to mitigate risk associated with product offers
  - Design and develop an on-boarding education strategy and sustainment programs