

CHAD R. O'CONNELL, AIF

SENIOR WEALTH ADVISOR

Chad manages Dopkins' retirement plan services group, which focuses on investment management, consulting and fiduciary governance services to corporations and not-for-profit entities. In addition, Chad also provides financial services to high net worth individuals and business owners. Chad has over 20 years of investment advisory and employee benefit experience. Throughout his career, he has assisted in the management of hundreds of retirement plans for entities ranging from sole proprietorships to Fortune 500 companies.

Prior to joining Dopkins Wealth Management, LLC, Chad held a variety of client service and relationship management positions for a major regional bank, notably as a senior Retirement Services Relationship Manager, where he was responsible for managing corporate and institutional retirement programs for the Bank's Western New York region. He has received formal training in investment fiduciary responsibility.

Chad received the Accredited Investment Fiduciary (AIF) designation from the University of Pittsburgh Foundation of Fiduciary Studies.



CONTACT

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EDUCATION

- M.B.A. Canisius College
- B.S. in Finance,
Rochester Institute of Technology