

The wealth management industry has been going through major changes. There are new types of investors, different desires, and technology has upped the ante with expectations. In 2009, Kevin Mahoney began working for Integris Wealth Management and in 2012 he became partner. He joined a unique firm. A firm that wanted to work as a team, collaborating to make the best decisions for their clients. He, along with partners Mike Leavy and Allison Barrientos operate as part of a 12-person team, working in financial planning and investment management. It seems that the current changes within the wealth management industry have been taken in stride by Integris.



INTEGRIS
WEALTH MANAGEMENT

Kevin Mahoney really enjoys his job. In fact, he said, “I am inspired by my work and I enjoy coming in each day”. With that kind of love for a job, you would think that Mr. Mahoney had this career in mind from a young age. That is not the case. It all started with a contest. It was either junior or senior year and Kevin partook in a stock picking contest. It was intriguing and it steered him in the direction of his current career. He began doing internships and followed the path to where he is today.



Integris Wealth Management operates as a team, but they are broken up into 3 smaller groups to divvy up the workload and make sure everything is running properly. Kevin primarily works with advisory and operations, but he wears several other hats as well. He is the firm’s Chief Compliance Officer and Operating Officer. Although this sounds like it would take up his entire life, he has it all under control and couldn’t be happier doing it. In the next 5-10 years, Kevin really sees himself contributing whatever he can to the firm’s success.

When discussing the pandemic, Mr. Mahoney explained that Integris had a seamless transition to the virtual world because they already had a technology platform set up. Although they weren’t currently doing video calls with clients out of the area, Covid 19 caused them to make some changes, but it has been all for the better. Speaking with clients face to face through video calls has made work relationships even richer and more authentic. It’s a win-win for the firm and their clients!

As far as being a partner in a firm, Kevin gave some great advice for current and upcoming business owners. “First thing that comes to mind is, you have to have a mindset of a constant problem solver. Running a business is problem solving. No problem is insurmountable. You are getting thrown curve balls and you have to be able to solve and fix these problems. You have to be prepared for that and enjoy it”, he says. With his many years of accomplishments, Kevin sounds like he is a great problem solver. We never did hear if he won that stock picking contest in college though. Inquiring minds want to know!

Telco Business Solutions

THANKS

