

Bank Investment Consultant

Top 25 program managers

Best managers in the bank channel

We once again scoured the industry for the most successful managers of investment services programs at banks and credit unions.

The winners were ranked on several criteria, including the number of advisers they oversee, team assets under management, percentage growth in team production, and production per adviser.



We uses variables that account for size, as well as metrics that capture growth and efficiency. That way, we recognize well-rounded professionals, as opposed to those who excel in one area but fall short in others. Scroll through to meet this year's top 25 program managers.

24. John Marx

John Marx

Institution: Elevations Credit Union

Location: Boulder, Colorado

TPM: CUSO Financial Services

Number of FAs on team: 8

2016 Total team AUM: \$370 million

2015 Total team AUM: \$319 million

2016 Team production: \$2.8 million

2015 Team production: \$2.6 million

Production per adviser: \$431,000

Is the nominee a producing manager? No

Number of years in current job: 6

Number of years in wealth management: 28

