



KYLE M. BANKS

ASSOCIATE ADVISOR

✉ kbanks@pkscpa.com

☎ 410-546-5600

With more than 10 years of industry experience, Kyle is an Associate Advisor with the firm. He works closely with the firm's Investment Advisors and clients to ensure strategies are followed, and goals are met.

Outside of work Kyle enjoys spending time with his friends and family, watching the Washington Nationals and Capitals, and staying active playing tennis, golf and pickleball. Kyle lives in Salisbury with his wife Bethany and son, Lucas.

AREAS OF PRACTICE

- 401(k), 403(b) & 457 Plans & Rollovers
- Asset Allocation and Portfolio Design
- Data Analysis
- Finance
- Financial Planning
- Investment Management
- Operations for Retirement Plan Services
- Portfolio Construction
- Retirement Income Planning
- Social Security Planning
- Trading

EDUCATION

- B.S. in Finance
- Salisbury University, Salisbury, Maryland

CERTIFICATIONS

- Registered Investment Advisor