



## John G. Kallis, MBA, J.D.

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### Biography

John G. Kallis is the Chief Operating Officer, Financial Advisor and Partner of the Meritrust Wealth Management group. Prior to joining Meritrust, John practiced for nine years at Merrill Lynch as a Financial Advisor and served for three years as an Associate Resident Director. John's chief responsibility is to provide custom consulting services for high net worth individuals, families and corporations.

John adheres to a disciplined process that delivers a consistent, conservative wealth management experience.

John has served as a board member for many local charitable organizations. He is license to practice law in the Commonwealth of Kentucky and did so for roughly 10 years prior to joining Merrill Lynch.

### Education

- University of Denver, JD/MBA
- University of Kentucky, BA in Finance

### Registrations and Licenses

- Series 7\*
- Series 9\*
- Series 10\*
- Series 66\*
- Life and Health Insurance

### Professional Memberships

- Kentucky Bar Association

### Community Associations

- American Heart Association Board Member

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