



hooker & holcombe



## Brian M. Kulik

Director of Operations  
Investment Advisory

As Director of Operations with Hooker & Holcombe's Investment Advisory Group, Brian oversees daily operations including new account set up, trading and rebalancing client accounts, database maintenance, plan analysis, compliance and a variety of special projects. He is also responsible for client reporting, investment technology and trading. Brian has worked in financial management operations since 2010.

Brian joined the firm as operations manager in 2017. Prior to Hooker & Holcombe, he was with Alex. Brown, a division of Raymond James where he served in a relationship manager capacity, responsible for rebalancing portfolios, analyzing manager research, and handling all client inquiries. Brian also served as operations team lead with Infinex Investments, Inc.

Brian earned a bachelor of arts in economics from the University of Connecticut. He holds FINRA series 7 and 66 securities licenses.

Check the background of this investment professional on [FINRA's BrokerCheck](#).