

# Southwestern Investment Group Welcomes Gary Bonner as Chief Operating Officer

FRANKLIN, Tenn., July 7, 2022 (SEND2PRESS NEWSWIRE) – Southwestern Investment Group, an independent wealth management company, today announced Gary Bonner has joined the firm as Chief Operating Officer. As an industry professional and serial entrepreneur, Gary brings more than 30 years of experience growing companies and leading cross-functional teams.



GARY BONNER OF SOUTHWESTERN INVESTMENT GROUP

Send2Press® Newswire

*PHOTO CAPTION: Gary Bonner, COO, Southwestern Investment Group.*

“We’re delighted to have Gary join us during this pivotal time of growth for the firm,” said Jeff Dobyns, President of Southwestern Investment Group. “Gary’s professionalism, deep insight, and track record of success speaks for itself. We’re excited to have him on board to help us continue our mission and to help steer and execute our strategic vision.”

“Gary is an innovative, experienced, and professional operations executive who brings a wealth of experience to this critical role,” said Matt Brinker, Manager Partner with Merchant Investment Management, a minority investor in Southwestern Investment Group. “His clear vision and deep understanding of the industry is well suited to the firm, and we’re very excited to have him

on board.”

Previously, Gary was a founder and Chief Operating Officer of Avalon Advisors, a Houston-based RIA founded in 2001, where he oversaw its growth in AUM from \$450 million with 10 employees to \$9 billion in AUM and 72 employees serving 550 client families. While at Avalon, he was responsible for all technology, cybersecurity, operational, and administrative areas and has extensive experience in both compliance and finance.

“I couldn’t be more honored to join such an esteemed organization as Southwestern Investment Group, said Bonner. “Jeff and his leadership team have done an outstanding job growing the firm and keeping a laser focus on delivering exceptional client service. The firm’s commitment to its people, clients, business partners, and the broader community is embedded in the culture and is what sets the firm apart.”

Gary is an active board and committee member within the RIA community, contributing to industry-related articles and serving as a panelist at industry conferences. He has also served in voluntary leadership roles with two Houston-based charities focused on children. Gary received his BA in Economics with a minor in Finance from Texas A&M University.

Southwestern Investment Group is a family of advisors that takes an integrated approach to wealth management and believes in a purpose bigger than itself. The company’s [core values](#) serve as further proof that success can be achieved by cultivating a culture of appreciation. For more information about Southwestern Investment Group, visit [swinvestmentgroup.com](http://swinvestmentgroup.com) or call 615-861-6100.

#### **About Southwestern Investment Group:**

As of 3/31/2022, Southwestern Investment Group was established in 2002 as an independent practice and manages more than \$5.8 billion in client assets. The advisors at Southwestern Investment Group are registered representatives with Raymond James Financial Services, a wholly-owned subsidiary of Raymond James Financial, which allows them to have the support of a large company while offering the personalized services of a smaller organization. Southwestern Investment Group uses sensible, sound, and conservative investment strategies and holistic services to enhance and help preserve your wealth. For more information, visit <https://www.swinvestmentgroup.com/>.

#### **About Raymond James Financial Services:**

As of 3/31/2022. Raymond James Financial Services, Inc. is a financial services firm supporting independent financial advisors nationwide. Since 1974, Raymond James Financial Services Inc., member FINRA/SIPC, has provided a wide range of investment and wealth planning related services through its affiliate, Raymond James & Associates, Inc., member New York Stock Exchange/SIPC. Both broker/dealers are wholly owned subsidiaries of Raymond James Financial, Inc. (NYSE-RJF), a leading diversified financial services company with approximately 8,500 financial advisors throughout the United States, Canada, and overseas. Total client assets are \$1.26 trillion.

Additional information is available at [raymondjames.com](http://raymondjames.com).

Securities offered through Raymond James Financial Services, Inc., member FINRA / SIPC. Investment advisory services offered through Southwestern Investment Advisory Services, Inc., an independent registered investment adviser. Southwestern Investment Group is not a registered broker-dealer and is independent of Raymond James Financial Services. Representatives may not be registered to offer securities and advisory services in all states.

**MULTIMEDIA:**

PHOTO link for media:

<https://www.Send2Press.com/300dpi/22-0707-s2p-Gary-Bonner-300dpi.jpg>

Caption: Gary Bonner, COO, Southwestern Investment Group.