



Tyler D. Nunnally

Founder & CEO

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Professional Biography

Tyler founded Nunnally International, Inc. to focus exclusively on the RIA market after serving as the Head of FinTech at M&A advisory EGL Holdings. Founded in 1988 as a merchant banking firm, EGL Holdings has over 200 mergers, acquisitions and global capital raise transactions to its credit.

Prior entering M&A, Tyler served as a strategist to leading advisor technology companies – including investor risk profiling provider FinaMetrica, which was acquired by Morningstar. He began his career in the wealth management industry as an executive at Oxford University spin-off consultancy, Oxford Risk.

Tyler has consulted hundreds of RIAs on matters of risk as a frequent speaker at industry conferences, host of countless webinars and key relationship manager to strategic partners at SEI Investments, TD Ameritrade, LPL, Fidelity, Schwab, Redtail, Orion Advisor Services, MoneyGuidePro and Fi360.

As an industry thought-leader, he has been published widely and interviewed extensively by The Wall Street Journal, Bloomberg, CNBC, Smart Money, Kiplinger and InvestmentNews. In addition to his work in M&A, Tyler serves as an expert witness in FINRA arbitration disputes and has consulted in multibillion-dollar class action lawsuits, including the BP oil spill in the Gulf of Mexico.

Tyler began his career as a budding entrepreneur in Eastern Europe following the collapse of communism. He has lived in the Czech Republic, Scotland, England and Spain. He currently resides in his hometown Atlanta with his wife Eva and their two teenage sons. Max is a promising high school athlete and Dylan is a Biochemistry major at University College Dublin in Ireland.

Tyler holds a B.A. from the University of Georgia and a Master's in International Business with Distinction from the University of St Andrews in Scotland.

Media Interviews

- The Wall Street Journal, Bloomberg, CNBC, Smart Money, Kiplinger, Charles Schwab, InvestmentNews, Wealth Management Magazine, Think Advisor, Investment Advisor Magazine, Money Management Intelligence, Financial Advisor IQ, PlanAdvisor, Wealth Management Today, RIABiz, Center for Public Integrity, WSB-TV Atlanta, WRKO Boston.

Publications

- Journal of Pension Benefits, *"In Whose Best Interest?: The Risk for Investment Fiduciaries"* (Fall 2019)
- Public Investors Arbitration Bar Association (PIABA), PIABA Bar Journal, *"Return of Volatility Highlights Exposure to Risk Assessment"* (Summer 2018)
- National Society of Compliance Professionals (NSCP), Currents, *"Compliance Becomes a Boardroom Issue"* (Summer 2016)
- American Bar Association (ABA), Section of Securities Litigation, *"Emerging Concerns Around Risk Tolerance and Suitability"* (Winter 2016)
- ThinkAdvisor, Blog contribution, *"3 Things Advisors Can Do to Help Clients Avoid Panic"* (Summer 2015)
- ThinkAdvisor, Blog contribution, *"What Do Tougher FINRA Suitability Standards Mean for You?"* (Spring 2015)
- SEI Investments, Practically Speaking Blog, *"Suitable Asset Allocation Made Easier"* (Fall 2013)
- National Society of Compliance Professionals (NSCP), Currents, *"Suitability and Risk Tolerance: What You Need to Know"* (Summer 2013)
- American Institute of Certified Public Accountants (AICPA) – Personal Financial Planning Division, Planner, *"Important Misconceptions about Risk Tolerance"* (Summer 2013)
- SEI Investments, Practically Speaking Blog, *"Why Risk Tolerance Is Critical to Your Practice"* (Spring 2013)
- Institute of Continuing Legal Education in Georgia, *"New Frontiers in Expert Testimony: Quantifying Risk in Commercial Litigation"* (Fall 2010)

Presentations

- Fi360, *"Assessing Client Risk Tolerance in a Fiduciary Future"* Panelist for INSIGHT 2017 conference (Spring 2017, Nashville, Tennessee)
- Financial Industry Regulatory Authority (FINRA), Emerging Regulatory Issues meeting, *"Investor Risk Profiling"*, Subject Matter Expert Presenter (Spring 2016, Washington, DC)
- Western Carolina University, *"Risk Tolerance Assessment in Practice"*, Guest Lecturer for Assistant Professor Duncan Williams financial planning course (Winter 2016, webcast)
- Financial Industry Regulatory Authority (FINRA), Emerging Regulatory Issues meeting, *"Risk Tolerance Assessment Review"*, Subject Matter Expert Presenter (Winter 2015, webcast)
- eMoney Advisor Summit, *"Human Touch: The Key to Good Advice"*, General Session and Breakout Session Speaker (Spring 2015, Carlsbad, California)
- Fi360, *"IPS AdvisorPro Integration with FinaMetrica"*, Speaker for INSIGHTS 2015 conference (Winter 2015, Orlando, Florida)
- Financial Planning Association (FPA) of Illinois, *"Best Practices: Risk Profiling to Instill Trust"*, General Session Speaker for Conference for Advanced Planning (Fall 2014, Chicago, Illinois)
- Financial Planning Association (FPA) of Central California, *"Best Practices: Risk Profiling to Instill Trust"*, Speaker for chapter event (Fall 2014, Fresno, California)
- eMoney Advisory Board meeting, *"FinaMetrica Risk Profiling"*, Presenter for Advisory Board meeting (Spring 2014, Paradise Island, Bahamas)
- Fi360, *"Risk Tolerance: Your Duty to Care"*, General Session Speaker for INSIGHTS 2014 conference (Spring 2014, Nashville, Tennessee)
- Georgia Psychological Association, *"Behavioral Economics: Background and Implications for I/O Psychologists"*, Speaker (Fall 2013, Atlanta, Georgia)

- The Georgia Society of CPA's, *"Best Practices in Applied Behavioral Finance"*, General Session Speaker (Spring 2012, Atlanta, Georgia)
- Technology Association of Georgia, *"Risks and Rewards in Global Markets"*, Panel Moderator (Fall 2011, Atlanta, Georgia)
- Georgia Institute of Technology, *"Hedging International and Financial Risk for the Technological Firm"*, Joint presentation with Professor Narayanan Jayaraman (Summer 2011, Atlanta, Georgia)
- Emory University, Goizueta School of Business, *"Risk and the Institutional Voids in Emerging Markets"*, Guest Lecturer for Executive MBA program (Winter 2011, Atlanta, Georgia)
- Society of Consulting Psychology, *"Behavioral Economics at Work"*, Speaker and Panel Member (Winter 2011, Las Vegas, Nevada)
- Georgia Trial Lawyers Association, *"New Frontiers in Expert Testimony: Quantifying Risk in Commercial Litigation"*. Speaker for Expert Testimony in State and Federal Courts in Georgia program (Fall 2010, Atlanta, Georgia)
- Emory University, *"The Art and Science of Risk Taking"*, Guest Lecturer for Professor C. Monica Capra behavioral economics course (Spring 2010, Atlanta, Georgia)
- American Bankers Association, *"Creative Risk Mitigation"*, General Session Speaker for Risk Management Forum (Spring 2010, St Petersburg, Florida)
- Georgia State University, Robinson School of Business, *"Behavioral Economics and Judgment Risk"*, Guest Lecturer for Instructor Alan W. Urech entrepreneurship course (Winter 2010, Atlanta, Georgia)
- Virginia Bankers Association, *"Optimizing Decisions and Managing Judgment Risk"*, General Session Speaker for Trust and Wealth Management Conference (Winter 2008, Richmond, Virginia)
- Institute of Actuaries *"Oxford Risk Rating"*, Presenter for Executive Committee meeting (Spring 2007, London, England)
- Association of Insurance and Risk Managers, *"Oxford Risk Rating"*, Presenter for New Product Committee meeting (Spring 2007, London, England)
- University of St Andrews, *"Entrepreneurial Risk Taking"*, Presenter for Entrepreneurship Society, (Spring 2004, St Andrews, Scotland)
- Academy of International Business, *"The Wall in the Brain"*, Presenter for Academy for International Business conference (Spring 2004, Londonderry, Northern Ireland)

Community Engagement

- Druid Hills Athletic Association (Board of Directors)
- Technology Association of Georgia (Board of Directors)
- Ulster Project Atlanta (Board of Directors and Co-President)
- Decatur YMCA (Social Entrepreneur)

Education

- B.A., University of Georgia
- Master's in International Business with Distinction (MBA), University of St Andrews
** founded in 1413, St Andrews is Scotland's first university and consistently ranked amongst the Top 5 in Britain*