

## Adam Lyon, CFA

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Adam Lyon is a wealth advisor located in the Walnut Creek Wells Fargo Private Bank office. Mr. Lyon is responsible for working with high-net-worth clients to assist them in effectively manage their wealth, first by identifying each client's unique goals then coordinating a team of specialists to implement custom, comprehensive wealth plans to help accomplish those goals.

Prior to joining Wells Fargo, Mr. Lyon worked at Northern Trust for 3 years, where he was a Wealth Strategist. He has been in the financial services industry for 25 years.

Mr. Lyon earned a Bachelor of Arts from UC Berkeley, and a Masters of Business Administration in Finance from San Francisco State University. He is also a Chartered Financial Analyst.

Adam is a native San Franciscan and an Eagle Scout. He is involved in several local civic, social and environmental entities including Lafayette Partners in Education, Lowell High School Alumni Association, Sons of California, California Historical Society, The Olympic Club, and California Waterfowl Association. He currently lives with his wife and 2 children in Walnut Creek.



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