

Matt Lynch, Managing Partner Strategy & Resources, LLC

Matt Lynch is the Managing Partner of Strategy & Resources, LLC, a financial services consulting firm. Matt, who has over 25 years of industry experience, has had a successful career as a financial services senior executive and consultant. He is sought after for his ability to link strategy with the art of the possible in terms of implementing change. Matt serves senior executives at financial services companies by focusing on corporate-level strategy, resource optimization and change management.


Matt's professional background includes progressive senior leadership roles as President & CEO of an independent broker-dealer and RIA, Capital Analysts Incorporated, CFO of Lincoln Financial Advisors, and field management roles with New York Life. His consulting credentials include Moss Adams, LLP, where Matt was a Director of the business consulting group where he was widely recognized for his industry expertise in succession planning, M&A, and financial services distribution strategies.



Matt is a frequent keynote speaker at company events and industry conferences for firms and organizations throughout North America. He also serves on the board of directors and/or in board advisory roles for a number of financial services companies.

Matt is a native of Dayton, Ohio and received his MBA from Xavier University in Cincinnati. He holds the Chartered Life Underwriter (CLU) and Chartered Financial Consultant (ChFC) professional designations from The American College.

Here's how to reach Matt Lynch: MLynch@StrategyResources.com or 937-938-8408.



The logo for Strategy & Resources features the word "STRATEGY" in a bold, black, sans-serif font at the top. Below it are three colored squares: orange, green, and blue. A thick black horizontal line runs across the middle. Below the line are three more colored squares: orange, green, and blue. At the bottom is the word "RESOURCES" in a bold, black, sans-serif font.

Strategy & Resources is a full-service consulting firm offering deep expertise within the Financial Services industry. We are well positioned to help our clients drive transformational change at a fast, but prudent pace, with limited risk, and maximum results.

As a top executive, you are focused on running a great business while ensuring that the executive leadership team is aligned when it comes to generating your collective vision and goals. The C-Suite will always have a lot riding on the strategic decisions.

Visit our website, www.StrategyResources.com, to see how we can help you change the outcome more effectively, and with less risk.