

MENTOR

CHAD RUDY

Chad Rudy is a CERTIFIED FINANCIAL PLANNER™ professional and serves as Executive Vice President for Retirement Investment Advisors, Inc. Since 2009, he has been providing comprehensive financial planning including investment review and planning, tax planning, estate planning, education funding, retirement planning, cash management, risk management, and other services to help individuals and families achieve their personal financial goals.

He received his MBA from Rice University and BBA in Finance and Management Information Systems from the University of Oklahoma. Prior to his Financial Advisory career, Chad worked for Fortune 100 companies Exxon and Compaq, was Director of Houston's 11th largest private company, and spent eight years as owner of a software company.

Chad is a highly trained professional who is committed to working in the best interests of those he serves. His professional designations and affiliations include the National Association of Personal Financial Advisors, the DFW Chapter of the Financial Planning Association, the Fee-Only Network, and the National Association of Registered Social Security Analysts.

2025 RED CONFERENCE



Chad has a long history of commitment to the community. He served as president of the Frisco Sunrise Rotary, is a graduate of Leadership Frisco, and volunteered as a head coach for his daughters' basketball teams. In 2015, Chad was elected to the Frisco Independent School District Board of Trustees where he served for seven years. For two of those years, he was selected by his colleagues to serve as Board President.

He lives in Frisco, Texas, with his wife Amy and daughters Kayla, Megan, and Tatum.