

INVESTMENT OPERATIONS PROFILE



April Regan Director of Operations

April joined the WealthPath team in 2021 as the Director of Operations. She brings her skills in management, organization, personnel administration, and finance to the WealthPath team. Her primary focus is client services, management operations and support of retirement plans at WealthPath. Working primarily at the Rogers office, April coordinates projects for partners, advisors and staff.

After graduating from Rogers High School, April earned her Bachelor of Science degree from the University of Tulsa. She joined the finance world in the Retirement Plan Operations team at Bank of Oklahoma. Following a move back to Northwest Arkansas, April went to work for MoneyGram International where she spent ten years. There she learned project management, worked with international teams and compliance to roll out new products and services and was a liaison with the Walmart Financial Services team for several years. Her work experience in banking, money transfers and project management have given her the tools to meet the client and advisor needs at WealthPath.

April holds herself to high standards as she works with clients, partners and team members. She is quickly learning the nuances of the wealth management business and aims to provide customer assistance tailored to meet the clients' needs.

When away from the office, April stays active with her husband and five sons. She also holds leadership roles in multiple school organizations and volunteers at church. She is often seen working in concession stands at school sporting events before or after her sons play. She enjoys early mornings, running, reading, warm weather and spending time with family.

AREAS OF FOCUS:

- New accounts & account maintenance
- Advisor support & staff leadership
- Meeting company compliance requirements
- Leading projects that encompass all advisors affiliated with WealthPath

EDUCATION:

University of Tulsa
Bachelor of Arts & Science
Major: Political Science

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