



Bradley Burr, CFP®
Wealth Advisor

**ASHTON
THOMAS**
PRIVATE WEALTH

Brad Burr joined Ashton Thomas in 2020 as a Wealth Advisor focusing on retirement plans for business, or 401(k) plans. Prior to joining Ashton Thomas, he led the 401(k) effort at Arizona-based Lovitt & Touché.

Brad is a native of Tucson, Arizona, and a graduate of the University of Arizona, where he majored in history and minored in economics and psychology. He started his career in the hospitality industry, holding various positions in places of interest like the South Pacific and Alaska. After working in a family business briefly, he was approached by a friend who worked for Rauscher Pierce Refsnes, a predecessor of RBC Wealth Management. His friend encouraged him to consider a career as a stockbroker with the firm and Brad took him up on the offer. The rest, as they say, is history.

In 1985, Brad left the brokerage world to join The Acacia Group in Phoenix where he met current Ashton Thomas advisor and friend, Jay Penney. After serving as the registered securities principal for Acacia's Phoenix office for 16 years, he stepped into the wholesale

world for a time, working as an external annuity wholesaler and then internally with an insurance marketing organization (IMO). In 2008, he joined Lovitt & Touché to focus on the retirement plan space for the firm.

“Whether it’s an individual client or a business client, you have to uncover their need and find a solution,” says Brad of his seasoned perspective on the advisory profession.

To better serve his clients through the years, Brad obtained his Certified Financial Planner® (CFP®) Professional designation in 1989. He was also past president of the Phoenix chapter of the National Association of Insurance Financial Advisors (NAIFA), a leading insurance professional industry association.

He and his wife, Cathy, have known each other since college and have been married for more than 35 years. They have two daughters, one who is an actress in New York City and one who lives with her family—which includes a grandson—in the Dallas metro area. Brad enjoys playing golf and traveling with Cathy to visit their family.