KRISTIAN R. PFEFFER

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PROFESSIONAL SUMMARY

Master of Trust and Wealth Management (MTWM) candidate at Campbell University — the nation's only graduate program of its kind — with advanced training in trust administration, fiduciary principles, estate and gift taxation, investment analysis, and wealth-transfer planning for high-net-worth (HNW) individuals and families. Combines six years as a U.S. Army officer accountable for $15M+ in assets with entrepreneurial success building a $2.2M first-year real estate practice. Brings a fiduciary mindset shaped by military stewardship: safeguarding what belongs to others, managing risk, and earning the trust of the people served. Trust administration, fiduciary service, estate and tax planning, and wealth transfer are that same promise, kept.

EDUCATION & CREDENTIALS

Master of Trust and Wealth Management (MTWM) August 2026
Campbell University, Lundy-Fetterman School of Business — Raleigh, NC

- **Coursework:** Investment Analysis; Advanced Income Taxation; Fiduciary Principles; Estate Taxation; Gift, Generation-Skipping & Fiduciary Income Taxation; Advanced Estate Planning; Wealth Management Sales; Legal & Regulatory Issues (Regulation 9, Uniform Trust Code, Prudent Investor Act, OFAC/BSA-AML).
- **Credentials:** CFP® (Certified Financial Planner) examination eligible upon graduation; CTFA (Certified Trust and Financial Advisor) and ATFA certification pathways.

BA, Political Science — Florida Atlantic University, Boca Raton, FL 2014

North Carolina Real Estate Broker License — Active Issued 2020

PROFESSIONAL EXPERIENCE

CEO & Co-Founder — Avant Garde Capital Realty, Fayetteville, NC 2020 — Present

- Built a book of business from the ground up through client acquisition and referrals, guiding families through the largest financial transactions of their lives and closing $2.2M in sales volume in the first year.
- Advise clients on asset valuation, market positioning, financing structures, and closing logistics, translating complex transactions into clear, actionable recommendations.
- Manage the full client lifecycle: prospecting, needs discovery, client onboarding, relationship management, retention, and referral development, the same prospect-pipeline dynamics at the core of wealth management sales.
- Direct day-to-day operations including due diligence and compliance with state licensing, contract, and disclosure requirements.

U.S. Army Officer — 1-73 CAV & 407th BSB, 2BCT, 82nd Airborne Division 2015 — 2021

Company Executive Officer (Logistics) 2018 — 2020

- Served as accountable steward of 197 property lines valued at $15M+, a fiduciary-style duty of care requiring meticulous documentation, account reviews, audits, and internal controls.
- Recovered $250,000 in lost government equipment and reduced excess property by $166,000 by coaching leaders and rebuilding a culture of accountability.
- Led 91 soldiers across 57 specialties supporting a 5,000-person brigade; maintained 95% readiness across 54 mission-essential vehicles.
- Authored the battalion safety standard operating procedure still in use today, a risk-management framework with zero accidents following implementation.

Battalion Planning Assistant 2018

- Redesigned ammunition sourcing from push to pull, producing highly accurate forecasts and recapturing unexpended allocations, disciplined resource forecasting analogous to portfolio, asset allocation, and cash-flow planning.
- Analyzed and planned 32 operations orders and coordinated 115 ranges in 5 months across 7 organizations.

Platoon Leader (Forward Operations, Mosul, Iraq) 2017 — 2018

- Accountable for $7M in equipment in a combat environment; sustained zero losses of personnel or property across 30 combat convoy operations.
- Trained and advised 6 coalition brigades through key-leader engagements, building trusted relationships and influence across cultures and organizations.

CORE COMPETENCIES

Trust Administration & Fiduciary Principles • Estate, Gift & Fiduciary Income Taxation • Wealth Transfer Strategies • Investment Analysis & Asset Allocation • Retirement Planning (ERISA) • Risk Management • Regulatory Compliance (Reg 9, UTC, Prudent Investor Act, BSA/AML, KYC) • Client Relationship Management • Client Onboarding & Retention • Business Development & Prospect Pipelines • Asset Accountability & Audit Controls • Team Leadership

HONORS

Combat Action Badge • Army Commendation Medal • Army Achievement Medal • Meritorious Unit Commendation