



Larry Lytle

Larry has been a financial advisor since 2004. He started his career at Smith Barney. After 5 years, he transferred to Merrill Lynch. In October of 2017 Larry moved to RBC Wealth Management. He has obtained the rank of Senior Portfolio Manager

Larry is a Certified Financial Planner®. This field of study encompasses all areas of planning for individuals and institutions. Some categories include: Business formation and tax structure, individual financial planning, Estate, Liability, and Risk management. The CFP process was built to mimic the CPA environment for accountants. At present about 20% of Advisors have obtained this certification.

He has a specialty working with non-profits. He obtained the Chartered Advisor in Philanthropy® certification. This license focuses on tools and techniques regarding the philanthropic environment. Topics include forming and running charitable organizations, advanced giving techniques, helping individuals identify their charitable interest, and best practices in Non-Profit management. At the time Larry obtained this certification, there were less than 10 CAPs in Phoenix and he was the only CAP at Merrill in a 3 state area.

Larry has worked with non-profits since the late 1980s. Soon after college, he was a founding member of his first non-profit. He opened the Indiana chapter of what became an international charity with offices in every state and about 50 nations around the world. He has helped launch 17, shut 3 down, and has worked most every position in-between.

Currently, Larry is a board member on the Banner Hospital Foundation focusing on raising fund for the partnership between Banner and the University of Arizona Medical School. He is on the board for TwinEpidemic, a charity that focuses on screening and treatment of cardiovascular disease and diabetes around the world.

He is also working closely with Institute of Fashion, Equality Health Foundation and When Foundation on their launch. Larry is helping to design a charitable vehicle to allow a local family to honor the passing of a family member. He is actively working with the following organizations on a consultative or advisory level: East Valley JCC, COPA Health, Amandas Hope Rainbow Angels, Turn a New Leaf, House of Refuge, Generation Justice, Hopes Crossing, T-Gen.

Previously, Larry and his wife, Tracey, have chaired events for Florence Crittenton, Arizona Science Center, JFCS, Homeward Bound, and others. In addition, he has worked with: Arizona 5 Arts Circle, SouthWest Human Development, Aid to the Adoption of Special Kids, Veterans Medical Leadership Council, Laruen's Institute for Education, Future for KIDS, Boys and Girls Club – East Valley, and a number of other valley agencies.

He was presented with a Philanthropy award from the Association of Fund Raising Professionals in 2011. In 2018 he was awarded by the Daughters of American Revolution for his community efforts.