



American Endowment Foundation



Alex Jeffries **Relationship Manager**

In his role as a Relationship Manager, Alex is responsible for managing new and existing relationships, and is a trusted charitable planning resource for advisors and their clients.

Prior to joining AEF, Alex was an Associate Financial Advisor with Burkhart & Co., preparing and managing comprehensive financial plans. Previously, he was an Investment Operations Specialist with Valmark Financial Group, where he fostered meaningful relationships with financial advisors, staff, and C-level executives. Among his financial services training experiences, he interned in Geneva, Switzerland with the International Co-operative Alliance supporting events and research focused on agriculture, fisheries, health, and housing.

Alex is a graduate of Kent State University with a Bachelor of Business Administration degree in Finance with a minor in International Business.

Founded in 1993, AEF is an IRS recognized public charity. AEF is the largest independent donor advised fund in the country. AEF was founded to provide personalized solutions and donor focused service. A donor advised fund is an account sponsored by AEF into which a donor is able to make an irrevocable gift of various assets, both liquid and illiquid. The donor recommends grants to qualified charities and nonprofit organizations that the donor desires to support.

Office

5700 Darrow Rd., Suite 118
Hudson, OH 44236

Phone

(888) 440-4233 ext. 114

E-mail

alexjeffries@aefonline.org