Gresham

Quinn McDaniel

Client Service Analyst

As a Client Service Analyst at Gresham, Quinn works closely with the Client Service Team and Associates to support the management of client accounts and the implementation of investment strategies.

Quinn began his career in wealth management in 2022 and joined Gresham in 2026 as an Analyst. In his role, he supports advisors in delivering comprehensive service to ultra-high-net-worth individuals and families, assisting with client onboarding, account administration, and ongoing service needs.

He collaborates closely with advisors, operations, and external partners to execute transactions, maintain accurate client records, and ensure a seamless client experience. Quinn also contributes to process improvements and operational efficiency initiatives, bringing a detail-oriented and proactive approach to his work.

Prior to joining the firm, he worked in wealth management operations and client service at Focus Partners Wealth (formerly Strategic Wealth Partners), where he supported advisory teams serving high-net-worth and ultra-high-net-worth clients. His experience includes complex account onboarding, custodial platform administration across Fidelity and Schwab, and coordinating money movement and account maintenance across multi-account client relationships. Quinn graduated from Marquette University with a degree in Finance and was a member of the Applied Investment Management program.

Outside of work, Quinn enjoys strength training, rock climbing, attending live music and concerts, and spending time outdoors. He also has an interest in vintage clothing and thrifting, occasionally organizing pop-up events with friends through an independent clothing project.

EDUCATION BACKGROUND

- B.S., Finance, Marquette University
- Applied Investment Management (AIM) Program

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