

## MEDALLION SERVICE AWARD RECIPIENT

# Clayton Hartman

By Micaela Myers

When UW College of Business alumnus Clayton Hartman speaks to future students, he shares with them his recipe for college success: striking a balance between academics and social life so that you come away with strong people skills and professional training. That lesson on balance carried into his professional life, where Hartman cultivated success in business, family and philanthropic pursuits.

“Whatever you do for work allows you to have a good family life — that’s my philosophy,” he says, adding that his wife Kandy, their daughters Haley and Morgan, their husbands Payden and Kevin, and their children are his biggest source of pride.

Hartman, a senior investment adviser representative with IFAM Capital and Impact Financial Strategies, received this year’s UWAA Medallion Service Award, which recognizes individuals who have given their time, talent and support to UW. As a financial expert, Hartman is a longstanding UW Foundation board member, serving on its investment committee and planned giving council. The Hartmans have also given to UW generously, establishing the Hartman Family Women’s

Basketball Endowment. They have supported athletics and infrastructure improvements on campus, including the Mick and Susie McMurtry High Altitude Performance Center, the Marian H. Rochelle Gateway Center and most recently the Difference Makers Campaign West Side Stadium. And they are not alone — Hartman says UW alumni support the university at one of the highest rates in the country.

“I always feel like I get way more back than I put in,” Hartman says. “I’ve been a lucky guy. I graduated from high school in Glenrock, Wyo. Had I not attended UW and earned my degree in accounting with the emphasis in finance (1979), I’m not sure any of this that I’ve accomplished would have been possible. So that’s why, when I’ve been asked to serve the university, it’s always been easy to say yes.”

As an investment consultant and adviser, Hartman discovered a love for helping people make the most of their money. “It’s an area of education that generally people don’t gain a good understanding of,” he says. “Early in my career in Casper, I was able to serve many of the retirees at the refineries. These were really hard-working guys — good savers, hard workers — but they never had a single day’s worth of financial classes.

I love being around people and helping them figure out what they should do with their money.”

Hartman spent the first 27 years of his career with the financial services companies EF Hutton, Shearson Lehman, Smith Barney and UBS. Early on, he and



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Kandy relocated to Fort Collins for easy access to the international airport for his business travels. His successful career has included serving as senior vice president of investments at UBS Wealth Management and senior vice president of wealth management

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and institutional consulting at Smith Barney/Citigroup, followed by his founding of Institutional & Family Asset Management. Hartman was recognized multiple times by Barron’s financial and investment news as one of the Top 1,000 Financial Advisers in the United States.

Hartman is also a businessman. He served on the board of Taco John’s for 20-plus years and owned multiple restaurants. He was also one of the founders of the Colorado Golf Club and a real estate development in Parker, Colo. He is currently chairman

of two boards: Regenxx Interventional Orthopedics and Consano Biologics.

Along the way, the Hartmans stayed involved with UW and their local community. “Our general philosophy has always been, if you’re in a good place, you should give back to your community,” he says. In addition to UW, he has served many other organizations and nonprofits, including the Medical Center of the Rockies/Poudre Valley Health System, Poudre School District Foundation, Fort Collins Chamber of Commerce, United Way, Fort Collins Cancer Society, the Better Business Bureau, Boy Scouts of America and Hospice.

As a student at UW, Hartman

achieved the social-academic balance he advises. He loved cheering on the Cowboys and Cowgirls and playing sports with his Sigma Nu fraternity brothers. He also mastered a solid understanding of accounting and finance that he says propelled him into becoming a good businessman.

Among the many benefits of staying involved with the university, he says, is the incredible people he’s gotten to know — from students and alumni to faculty, staff and fellow board members.

“It’s just a special place,” Hartman says. “I’m so proud of our graduates and what they give back — both in money and time.”



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