



Jeremy Robert

CFA

SENIOR INVESTMENT ANALYST

Experience

Mr. Robert has more than six years of experience in the financial services industry supporting the needs of individual investors as well as corporate institutions and their retirement plan participants. As an investment analyst in The MFA Companies'® Wealth Management Practice, Jeremy's primary responsibilities include the search, selection and ongoing monitoring of existing managers as well as the continuous due diligence of new managers. He also monitors and maintains customer portfolios within specified Investment Policy Statements and assists with trading as well as modeling/re-balancing and/or restructuring of customer portfolios.

Jeremy began his career as a financial advisor with the Life Solutions Group, an affiliate of The Penn Mutual Life Insurance Company. He most recently served as an investment advisor with Kraematon Investment Advisors where he assumed investment management, research and customer service responsibilities. He also worked closely with the firm's 401(k) division to provide customers with plan administration services including market updates, enrollment and plan participant education.

Expertise

- Monitor and maintain customer investment portfolios
- Customer investment review presentations
- Trading duties
- Investment manager search and selection
- Due diligence on prospective investment managers
- Ongoing performance analysis of current investment managers

Education

- BA – Finance and Law, *Cum Laude*; Bentley University

Certifications

- CFA – Chartered Financial Analyst®
- FINRA Series 6 – Investment Company and Variable Contracts Products Representative
- FINRA Series 63 – Uniform Securities Agent
- FINRA Series 65 – Investment Adviser Representative