C.M. Macgowan

CFA

PARTNER & PRESIDENT,
WEALTH MANAGEMENT PRACTICE

Experience

Mr. Macgowan brings industry-specific expertise in the areas of portfolio management, investment analysis and market strategy to his role at The MFA Companies®. As Partner & President of the Wealth Management Practice, C.M. regularly interacts with the Firm's customer base to convey investment philosophy and provide updates regarding market performance and trends. He develops ongoing portfolio recommendations based on tactical asset reallocation, tax considerations and evolving customer objectives – all with the end goal of ensuring financial well-being for the Firm's customers. C.M. also serves as an Investment Officer on the Firm's Investment Committee.

Prior to joining the Firm, C.M. was a Portfolio Manager at Ropes & Gray where he managed $2 billion of customer assets ranging from mutual funds to private equity investments. He also served in an investment analyst capacity at Old Mutual Asset Management in Boston where he honed his ability to conduct in-depth market research and execute investment strategy.

Expertise

- Investment search and selection
- Investment analysis and strategy
- Quantitative and qualitative market analysis
- Market research and commentary
- Portfolio management and review
- Asset allocation
- Due diligence
- Customer relationship management

Education

- MBA – Master of Business Administration, Finance; University of New Hampshire
- BS – Psychology, *Magna Cum Laude*; University of New Hampshire

Certifications

- CFA – Chartered Financial Analyst®

Professional Affiliations

- CFA Institute
- Boston Security Analysts Society (BSAS)