



# Melissa Santas Peterson

CFA

PARTNER & CHIEF INVESTMENT OFFICER,  
WEALTH MANAGEMENT PRACTICE

## Experience

With over ten years of experience, Ms. Peterson is a seasoned professional who provides comprehensive investment analysis and recommendations to the customers of The MFA Companies®. As Partner & Chief Investment Officer of the Wealth Management Practice, Melissa offers customers a wide-breadth of research on investments (mutual funds, ETF's, SMA, closed-end equity and fixed income funds, alternative investments and hedge fund strategies for portfolios) as well as detailed presentations on active buy/hold/sell recommendations. Melissa also participates in due-diligence meetings with current and prospective independent account managers.

Melissa's experience includes developing detailed, systematic approaches for assessing portfolio performance using a variety of systems and techniques. She serves as an Investment Officer on the Firm's Investment Committee and has extensive experience preparing and reporting to Investment Committees in order to make investment recommendations appropriate for model-portfolios by presenting performance, risk and attribution updates and performance reviews for both internal and external investment managers.

## Expertise

- Investment strategy
- Qualitative investment analysis
- Quantitative investment analysis
- Market research and commentary
- Portfolio analysis
- Portfolio management
- Due diligence
- Asset allocation
- Customer relations

## Education

- MBA – Master of Business Administration, Suffolk University
- BA – Business Economics, The College of Wooster

## Certifications

- CFA – Chartered Financial Analyst®

## Professional Affiliations

- Boston Security Analysts Society (BSAS)