

# Executive Management Profile



**Jeffrey Mortimer, CFA**  
Director of Investment Strategy

Jeffrey Mortimer is the director of investment strategy for BNY Mellon Wealth Management. In this role, he leads a team that sets capital market expectations and is responsible for making asset allocation recommendations.

Jeff has more than 25 years of experience in the financial services industry. Prior to joining the firm, Jeff worked for Charles Schwab for 13 years in increasingly senior positions, culminating with his appointment as chief investment officer. He also worked for nearly 10 years in boutique firms in the Boston area, serving high net worth individuals and families.

He is a national speaker on issues of investment strategy, the financial markets and the economy. He has been featured in numerous media outlets, including Barron's, Fortune, Bloomberg and CNBC.

## **Education**

- Master of Business Administration, University of Chicago Graduate School of Business
- Bachelor of Science, Babson College

## **Certifications**

- CFA charterholder