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Manager, Institutional Business Development
Wealth Management, Northeast Region

Joined Harding Loevner in 2014

Previous Experience

RS Investments, Investment Research Group, April–November 2013

- Investment Director

Merrill Lynch Managed Solutions Group, 2006–13

- Associate Wealth Management Specialist, Vice President
- Internal Wealth Management Specialist, Assistant Vice President

Merrill Lynch Financial Advisory Center, 2005–06

- Investor Services Advisor

Education

Rider University, BA, Business Administration & Health Administration, 2004

Certified Financial Planner™ Certificiant, 2008

Chartered Financial Analyst designation, 2011