

OPPORTUNISTIC YRS 0-5 MUNICIPAL BOND



Rob Brown, PhD, CFA®

Chief Investment Officer
Senior Vice President
Chairman - Integrated Partners Investment Committee

Website

www.robbrownonline.com

Previous Experience

Chief Investment Officer, Goldman Sachs Personal Financial Management, Los Angeles, CA
Chief Investment Officer, Genworth Financial Asset Management, Los Angeles, CA
Chief Investment Officer, Arizona Public Safety Personnel Retirement System, Phoenix, AZ
Director - Curriculum, CFA Institute, Charlottesville, VA
Executive Vice President, PMC International (later Envestnet), Denver, CO
Managing Director - Research, SEI, Chicago, IL
Assistant Professor of Finance, University of Colorado, Boulder, CO

Education

AB, Economics and Mathematics, Oberlin College
MA, Economics, University of Maryland at College Park
MA, Economics, Northwestern University
PhD, Finance, Northwestern University
Chartered Financial Analyst (CFA®)

Began Career in 1985

As the CIO, Rob leads discussion of macroeconomic, capital market, and behavioral finance decision-making issues with clients, advisers, business partners, and the press. He directs the Integrated Financial Partners investment management department. In that role, he provides leadership for investment product development and evolution, asset management strategy, and prospective macroeconomic and capital market assessment, to assure that Integrated's investment platform best supports its more holistic approach to wealth management and advice planning.

Rob is a senior level investment professional with over three decades of experience in portfolio management for large, sophisticated foundations, endowments, pensions, and the ultra-high net worth. Prior to Integrated Financial Partners, he held executive positions with Goldman Sachs, Genworth Financial, SEI, Envestnet, and the CFA Institute, where he directed the ongoing development of the educational curriculum for the CFA certification program and its examination.

During his tenure with Goldman Sachs, he directed the investment management department, a team that included 9 CFA® Charterholders who oversaw \$18.6 billion. While at Genworth, Rob served as the Chief Investment Officer directing a \$7.5 billion institutional portfolio of domestic and international securities. At SEI, he worked as the Managing Director of SEI's Research Department that supported the wealth management needs of over \$300 billion of pension, endowment, and foundation assets under advisement. At Envestnet, Rob served as the Chairman - Investment Policy Committee, Executive Vice President, and Senior Managing Director - Consulting Division for PMC International (later acquired by Envestnet), where he led the investment decision-making for a \$3.3 billion portfolio. Rob also worked in the public sector, where he held the position of Chief Investment Officer for one of our nation's larger state public pension plans, the Arizona Public Safety Personnel Retirement System.

Prior to joining the investments industry, Rob served as a Professor of Finance at the University of Colorado in Boulder from 1985 through 1989. During this time, he held a faculty position within the graduate school and taught students at the PhD, MBA, and undergraduate levels.

He is a member of the Financial Management Association and the Financial Planning Association. Rob has completed Six Sigma Quality Control training with General Electric and holds GE's Green Belt process management designation. He also maintains his FINRA Series 65 securities license.

Rob serves as an Editorial Board member for the Journal of Investing, Journal of Finance and Market, and International Journal of Economics, Finance and Management Sciences. His publications have appeared in the Journal of Derivatives and Hedge Funds, Journal of Investing, Journal of Investment Consulting, Journal of Beta Investment Strategies, Pensions & Investments, FA Magazine, RIA Central, On Wall Street Magazine, Royal Alliance Associates Sourcebook, Bank Investment Consultant, Investment News Magazine, London Financial Times, Financial Markets and Portfolio Management, Financial Planning, Financial Advisor, Journal of Finance and Market, Journal of Wealth Management, and Journal of Financial Planning.



The information in this document is for the purpose of information exchange. This is not a solicitation or offer to buy or sell any security. You must do your own due diligence and consult a professional investment advisor before making any investment decisions. The use of a proprietary technique, model, or algorithm does not guarantee any specific or profitable results. All information contained in this document is believed to come from reliable sources. We do not warrant the accuracy or completeness of information made available and therefore will not be liable for any losses incurred. No representation or warranty is made as to the reasonableness of the assumptions made herein. Investment advice offered through Integrated Wealth Concepts LLC (a Registered Investment Adviser), d/b/a Integrated Financial Partners, Inc.

Integrated Financial Partners, Inc.

200 Fifth Avenue, 4th Floor • Waltham, MA 02451

Phone 781-890-3045 • Website <https://integrated-partners.com>