

Bob Sheehan, CFA, CMT

66 Pearl St. Apt 608, New York, New York 10004 | (240) 672-7418 | bobsheehan23@gmail.com

EXECUTIVE SUMMARY

- Skilled financial professional with experience in Portfolio Management and Investment Research.
- Serve in a dual role managing both custom multi-asset portfolios as well as pooled Large Cap Equity Strategy.
- Proficient in all facets of managing a portfolio including idea generation, investment selection, risk management, and ongoing monitoring of portfolios.
- CFA & CMT Charterholder demonstrating unique skillset of expertise in both fundamental & technical analysis

WORKPLACE EXPERIENCE

AVP, Portfolio Manager Associate and Equity Analyst, Bank of America Private Bank, New York, NY

July 2016- Present

- Support Portfolio Managers with the oversight and management of UHNW accounts totaling \$4B+ AUM.
- Establish customized investment plans, construct and monitor portfolios, communicate investment rationale, trading and rebalancing, tax loss harvesting, etc.
- Communicate with clients and other team members to continuously ensure we are meeting client objectives.
- Prepare proposals for prospective client pitches and provide ongoing assistance to sales team to ensure close.
- Lead Equity Analyst for the Strategic Growth Strategy, a Large Cap Growth Equity strategy with \$800M AUM. The strategy utilizes fundamental, technical, and thematic analysis.
- Present on national calls to portfolio managers as well as internal calls with various investment committees to provide updates on performance, portfolio changes, and current investment outlook.
- Create and distribute research reports on a variety of investments to internal partners, as well as clients.

Equity Research Rotational Analyst, Bank of America Private Bank, New York, NY

January 2016- July 2016

- Supported the Research Analysts with sector and company specific research
- Built and maintained various financial models for companies on the Equity Approved List
- Presented research during the weekly Equity Research meeting with portfolio managers across the country
- Attended conferences and meetings with external analysts and compiled/distributed notes for internal use

Global Portfolio Solutions Rotational Analyst, Bank of America Private Bank, New York, NY

July 2015- January 2016

- Supported the daily operations of GPS, the group responsible for managing U.S. Trust's model portfolios
- Helped to create and maintain documents detailing the research, investments, and processes of GPS
- Provided research on various mutual funds and SMAs for the newly commissioned ESG strategy

EDUCATION

Providence College, Providence, Rhode Island;

BS Finance, May 2015; Minor: Economics

Overall GPA 3.54

COLLEGIATE ATHLETIC EXPERIENCE

D1 Varsity Men's Lacrosse Team Member, Providence College, Providence, RI, 2011-2015

- Balanced 30+ hour weekly athletic schedule while maintaining strong academics
- Developed Leadership, problem solving, and communication skills through intra-team conflicts
- Dedicated, team player willing to take on different roles to ensure team's success

HONORS & AWARDS

- Men's Lacrosse Academic Achievement Award for 2014-2015 School Year (Presented by the Coaches)
- Big East All Academic Honors, 2011-12, 2012-13, 2013-2014, 2014-2015
- Member of Chi Alpha Sigma National College Athlete Honor Society
- St. Vincent Scholarship Providence College
- Dean's List: Fall 2011, Fall 2013, Fall 2014, Spring 2015
- Student-Athlete Academic Achievement Award, 2011-2012