

# **Bob Sheehan, CFA, CMT**

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## **EXECUTIVE SUMMARY**

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- Skilled financial professional with experience in Portfolio Management and Investment Research for both individual client accounts as well as pooled assets.
- Proficient in all facets of Portfolio Management, including planning, investment selection, implementation, and ongoing monitoring of Portfolios.
- Passionate about Investment Research, particularly the fusion of Fundamental, Technical, and Macro analysis to find the most attractive investment opportunities.
- CFA & CMT Charterholder

## **WORKPLACE EXPERIENCE**

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### **AVP, Portfolio Manager Associate, Bank of America Private Bank, New York, NY**

*July 2016- Present*

- Support Portfolio Managers with the oversight and management of client accounts. Duties include, but are not limited to, providing investment advice, portfolio construction, trading & rebalancing, tax loss harvesting etc.
- Work as an Equity Analyst on the Strategic Growth Strategy, an internally managed proprietary GARP Equity strategy. The strategy utilizes a unique blend of Fundamental, Technical, and Behavioral Analysis.
- Create and distribute research reports on a variety of investments to internal partners, as well as clients.
- Communicate with clients and other team members to continuously ensure we are meeting client objectives.
- Assist in the planning and preparation for prospective client pitches.

### **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**

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### **Providence College, Providence, Rhode Island;**

BS Finance, *May 2015*; Minor: Economics

Overall GPA 3.54

## **COLLEGIATE ATHLETIC EXPERIENCE**

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### **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 in order for team's success
- Demonstrated strong work ethic and competitive nature

## **HONORS & AWARDS**

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- 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*