William F. Bahl, CFA, CIC

Co-Founder, Chariman, Portfolio Manager & Principal

Co-Founded Bahl & Gaynor in 1990

Joined industry in 1974

As Co-Founder of Bahl & Gaynor, Bill is responsible for many of the guiding principles still operative at the firm today including a singular commitment to dividend growth investing and employee ownership. In his Portfolio Manager role, Bill works primarily with high net worth clients along with select institutional relationships. Bill is a member of the Investment Committee and offers his extensive insight into the analysis of Financial sector investment opportunities.

Prior to forming Bahl & Gaynor in 1990, Bill’s work included positions at Northern Trust (Vice President and Chief Investment Officer), Fifth Third Bank (Vice President and Chief Investment Officer) and Mellon Bank (Investment Officer).

**Educational Background**

* Chartered Investment Counselor (1991)
* Chartered Financial Analyst® (1979), CFA Institute
* Master of Business Administration (1973) ‘With Distinction,’ University of Michigan
* Bachelor of Business Administration (1972) ‘With High Honors’ University of Florida

**Affiliations**

* CFA Society of Chicago, Past Trustee
* CFA Society of Cincinnati, Past President, Member
* Cincinnati Country Day School, Past Chairman of the Board
* Cincinnati Country Day School Foundation, Past Chairman
* The Deaconess Associations, Cincinnati, Trustee
* The Deaconess Hospital, Cincinnati, Past Chairman of the Board
* Hamilton County Parks Foundation, Past Trustee
* Indian Hill Church, Member
* Leadership Cincinnati, Class VIII
* Talbert House Foundation, Past Trustee

Vere W. Gaynor

Co-Founder, Chariman, Portfolio Manager & Principal

Co-Founded Bahl & Gaynor in 1990

Joined industry in 1972

As Co-Founder of Bahl & Gaynor, Vere is responsible for many of the guiding principles still operative at the firm today including a singular commitment to dividend growth investing and employee ownership. In his Portfolio Manager role, Vere works primarily with high net worth clients along with select institutional relationships. Vere is a member of the Investment Committee and through his many years of investment experience contributes Top Down insight to the Committee.

Prior to forming Bahl & Gaynor in 1990, Vere’s work included positions at Scudder, Stevens & Clark (Managing Director) and U. S. Trust (Portfolio Manager).

**Educational Background**

* Master of Business Administration (1971), Columbia University, Concentration in Finance and International Business
* Bachelor of Arts (1970), Columbia University, Major: Political Science

**Affiliations**

* Avon Old Farms School, Former Trustee
* Beechwood Home, Board Member
* Boys and Girls Clubs, Past Chairman, Life Trustee
* CFA Society of Cincinnati, Member
* Church of The Redeemer, Member
* Cincinnati Art Museum, Past Treasurer, Former Trustee
* Cincinnatus, Former Member
* Cincinnati Playhouse in the Park, Former Trustee
* Cincinnati Squash Racquets Association, Past President
* Contemporary Arts Center, Former Trustee
* Mercantile Library, Past President
* The University Club, Past President

George G. Strietmann, CFA, CIC

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 1992

Joined industry in 1980

As a Portfolio Manager George has a local focus working primarily with high net worth individuals and families as well as select institutional clients. With significant prior trust department experience, Lori works with many multi-generational clients that employ various legacy transition vehicles. George is a member of the Investment Committee covering the Pharmaceuticals industry within the Health Care sector.

Prior to joining Bahl & Gaynor in 1992, George’s work included positions at Fifth Third Bank (Vice President and Senior Trust Officer) and Empire National Bank (Portfolio Manager).

**Educational Background**

* Chartered Investment Counselor (1992)
* Chartered Financial Analyst® (1988), CFA Institute
* Master of Business Administration (1979), Xavier University, Concentration in Finance
* Bachelor of Business Administration (1977), University of Cincinnati

**Affiliations**

* Ault Park Advisory Council, Past Board Member and Treasurer
* CFA Society of Cincinnati, Past President and Trustee, Member
* Cincinnati Observatory Center, Treasurer and Trustee
* Participant in the 1980 and 1984 Olympic Trials – Sailing
* Purcell Marian High School, Past Chairman, Board Member
* Ronald McDonald House of Greater Cincinnati, Planned Giving Committee Member
* Saint Mary’s Church, Hyde Park, Member
* Xavier University Center for Catholic Education, Advisory Board Member
* YWCA of Greater Cincinnati, Past Investment Committee Member

Charles A. Pettengill, CFA, CIC, CPA

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 1997

Joined industry in 1991

As a Portfolio Manager, Chip has a local focus working primarily with high net worth individuals and families as well as select institutional clients. Significant prior experience allows him to work with many multi-generational clients that employ various legacy transition vehicles. Chip is a member of the Investment Committee covering the Industrial sector.

Prior to joining Bahl & Gaynor in 1997, Chip’s work included positions at Fifth Third Bank (Assistant Vice President and Portfolio Manager), Kendle Research Associates (Chief Financial Officer), and Deloitte & Touche (Capital Markets Division Manager).

**Educational Background**

* Chartered Investment Counselor (1998)
* Chartered Financial Analyst® (1996), CFA Institute
* Certified Public Accountant (1987)
* Master of Business Administration (1986), University of Chicago, Concentration in Finance
* Bachelor of Arts (1984), Colgate University, Major: Economics

**Affiliations**

* The Campaign for CCDS, Past Co-Chair
* The Campaign for LADD, Past Co-Chair
* CFA Society of Cincinnati, Member
* Cincinnati Country Day School, Past Board President
* Cincinnati Country Day School Annual Fund, Past Chairman
* Cincinnati Eye Bank, Vice President
* Living Arrangements for the Developmentally Disabled, Past Board President

Eleanor K. Moffat, CFA, CIC

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 1999

Joined industry in 1989

As a Portfolio Manager, Ellie has a local focus working primarily with high net worth individuals and families as well as select institutional clients. Extensive experience engaged with working professionals allows her to facilitate constructive conversations about future wealth planning and portfolio positioning. Ellie is a member of the Investment Committee covering part of the Consumer Discretionary sector.

Prior to joining Bahl & Gaynor in 1997, Ellie’s work included positions at Bartlett & Co. (Senior Portfolio Manager), First National Bank of Maryland (Vice President and Unit Head), and Mellon Bank (Divisional Representative).

**Educational Background**

* Chartered Investment Counselor (2000)
* Chartered Financial Analyst® (1988), CFA Institute
* Master of Administrative Science (1984), Johns Hopkins University
* Bachelor of Arts (1978), Princeton University

**Affiliations**

* All Saints Church, Member
* CFA Society of Cincinnati, Member
* Cincinnati College Conservatory of Music, Past Trustee
* Cincinnati Parks Foundation, Trustee
* Dress for Success, Executive Officer and Board Member
* Fine Arts Fund Advisory Board, Past Board Member
* Fourth Street Boutique, Past Board Member
* Junior League of Cincinnati, Sustaining Member
* Kindervelt Children’s Hospital Medical Center, Past Executive Officer
* Ohio Valley Princeton Club, Past President and Executive Officer
* St. Ursula Villa School, Past Executive Officer and Trustee
* St. Xavier High School Mothers’ Club
* United Way, Investment Oversight Committee

Scott D. Rodes, CFA, CIC

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 2001

Joined industry in 1986

As a Portfolio Manager, Scott works with both high net worth and institutional clients. He travels regularly to support the firm’s national platform business. Scott is a member of the Investment Committee covering the Hardware industry within the Information Technology sector and the Materials sector. He is the Gatekeeper for the smig® - Small/Mid Cap Income Growth strategy.

Prior to joining Bahl & Gaynor in 2001, Scott’s work included positions at Northern Trust (Vice President and Senior Portfolio Manager), Waddell & Reed (Research Analyst), and Fifth Third Bank (Assistant Vice President and Senior Portfolio Manager).

**Educational Background**

* Chartered Investment Counselor (2007)
* Chartered Financial Analyst® (1993), CFA Institute
* Master of Business Administration (1987), Xavier University
* Bachelor of Engineering in Mechanical Engineering (1985), Vanderbilt University

**Affiliations**

* CFA Society of Cincinnati, Member
* University Club of Cincinnati, Board Member
* Xavier University, Williams College of Business, Student Mentor

Lori A. Hudson

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 2003

Joined industry in 1984

As a Portfolio Manager, Lori has a local focus working primarily with high net worth individuals and families. With significant prior trust department experience, Lori works with many multi-generational clients that employ various legacy transition vehicles. Lori is a member of the Investment Committee covering the Consumer Staples sector.

Prior to joining Bahl & Gaynor in 2003, Lori’s work included her role as Assistant Vice President and Senior Trust Officer at Fifth Third Bank.

**Educational Background**

* Bachelor of Arts (1981), University of Cincinnati

**Affiliations**

* Beechacres, Volunteer
* Dress for Success, Volunteer
* Kindervelt, Past Board Member
* University of Cincinnati, McMicken College, Past Advisory Board Member
* YMCA of Greater Cincinnati, Board Member, Past Finance/Investment Committee Member

Edward A. Woods, CFA, CIC

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 2004

Joined industry in 1990

As a Portfolio Manager, Ed works with high net worth and institutional clients. He also coordinates third-part distribution relationships that support Bahl & Gaynor’s national platform partners. Ed is a member of the Investment Committee covering the Non-Bank Financial industries within the Financial sector. He is the Gatekeeper for the Small Cap Growth strategy.

Prior to joining Bahl & Gaynor in 2003, Ed’s work included positions at Northern Trust (Vice President and Senior Investment Counselor), LaSalle Bank (Assistant Vice President and Portfolio Manager), Star Bank (Portfolio Manager) and Fifth Third Bank (Trust Officer and Portfolio Manager).

**Educational Background**

* Chartered Investment Counselor (2007)
* Chartered Financial Analyst® (1996), CFA Institute
* Master of Business Administration (1996), University of Cincinnati
* Bachelor of Arts (1989), Wittenberg University

**Affiliations**

* Biostart, Past Finance Committee Member
* CFA Society of Cincinnati, Member
* University of Cincinnati – MSBA Finance Advisory Board, Past Member

John B. Schmitz, CFA, CIC

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 2005

Joined industry in 1985

As a Portfolio Manager, John works with both high net worth and institutional clients nationwide. Through his extensive prior institutional experience, John is responsible for a number of Bahl & Gaynor’s local and nationwide foundation and endowment relationships. John is a member of the Investment Committee covering the Energy sector. He is the Gatekeeper for the Income Growth and Quality Growth strategies.

Prior to joining Bahl & Gaynor in 2005, John’s work included positions at Fifth Third Bank (Managing Director, Core Equity Strategies), Central Trust Company (Investment Analyst) and The Citizens and Southern National Bank (Commercial Loan Officer).

**Educational Background**

* Chartered Investment Counselor (2007)
* Chartered Financial Analyst® (1992), CFA Institute
* Bachelor of Business Administration (1982), The University of Cincinnati

**Affiliations**

* CFA Society of Cincinnati, Member
* Christ the King Athletic Commission, Former President
* Franciscan Service Program, Former Board Member
* Great Cincinnati Civic Garden Center, Former Board Member
* Medical Foundation of Cincinnati, Former Board Member
* Queen of Angels Montessori School, Former Board Member
* St. Xavier High School, Former Board Member

Ellis D. Hummel, CFP®

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 2008

Joined industry in 1993

As a Portfolio Manager, Ellis has a local focus working primarily with high net worth individuals and families. His expertise extends into Bahl & Gaynor’s financial planning efforts available to direct clients of the firm and includes cash flow planning, generational wealth preservation and transfer, and developing strategies for those in and working towards retirement. Ellis is a member of the Investment Committee covering the Transportation and Utility sectors.

Prior to joining Bahl & Gaynor in 2008, Ellis’s work included positions at Haberer Registered Investment Advisors (Vice President and Portfolio Manager), Foster & Motley, Inc. (Portfolio Manager), Charles Schwab & Company, Inc. (Branch Manager), Fidelity Investments (Financial Representative) and Gradison McDonald & Company Securities (Mutual Fund Sales & Administrative Representative).

**Educational Background**

* CERTIFIED FINANCIAL PLANNER™ professional (2002), College for Financial Planning
* Bachelor of Arts (1990), Skidmore College, Major: Government

**Affiliations**

* Financial Planning Association (FPA) of Southwestern Ohio, Member
* Living Arrangements for the Developmentally Disabled (LADD), Board Member

Nicholas W. Puncer, CFA, CFP®

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 2010

Joined industry in 2007

As a Portfolio Manager, Nick works primarily with institutional clients along with select high net worth relationships. He also coordinates third-part distribution relationships and travels regularly to support Bahl & Gaynor’s national platform partners. Nick is a member of the Investment Committee covering the Software and Services industries within the Information Technology sector.

Prior to his role as Portfolio Manager, Nick’s positions at Bahl & Gaynor included Research Analyst and Co-Op.

**Educational Background**

* Chartered Financial Analyst® (2014), CFA Institute
* CERTIFIED FINANCIAL PLANNER™ professional (2014), College for Financial Planning
* Bachelor of Business Administration (2010) *Summa Cum Laude*, University of Cincinnati, Major: Finance & Business Economics

**Affiliations**

* Carl H. Lindner Honors PLUS Advisory Board, Alumni Member
* CFA Society of Cincinnati, Member
* Friends of CCM – University of Cincinnati College Conservatory of Music, Harmony Fund Committee Member
* Kautz-Uible Economics Department Scholarship Fund, Trustee

Stephanie S. Thomas, CFA

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 2012

Joined industry in 1990

As a Portfolio Manager, Stephanie works primarily with institutional clients along with select high net worth relationships. She also coordinates third-part distribution relationships that supports Bahl & Gaynor’s national platform partners. Stephanie is a member of the Investment Committee covering the REIT sector.

Prior to joining Bahl & Gaynor in 2012, Stephanie’s work included various positions at Fifth Third Bank: Managing Director of Client Management, Fifth Third Asset Management; Senior Investment Advisory, Investment Advisors Division; Commercial Banker, Commercial Banking Team.

**Educational Background**

* Chartered Financial Analyst® (2001), CFA Institute
* Master of Business Administration (1996), University of Notre Dame
* Bachelor of Arts (1989), Wittenberg University, Major in Economics, Minor in Business

**Affiliations**

* ArtsWave, Finance and Investment Committee Member
* CFA Society of Cincinnati, Board Member

W. Jeff Bahl

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 2014

Joined industry in 2001

As a Portfolio Manager, Jeff works with both high net worth and institutional clients. He is the Director of Trading and oversees customized fixed-income offerings for direct clients. Jeff is a member of the Investment Committee covering the Banking industry within the Financial sector.

Prior to joining Bahl & Gaynor in 2014, Jeff’s work included positions at Goldman Sachs (Managing Director and Head of High Yield Credit Trading), Bank of America (Vice President, High Yield Credit Trading Department), Lehman Brothers (Investment Grade Credit Trading and Debt Capital Markets Investment Banking).

**Educational Background**

* Bachelor of Science in Business Administration (2002) *Magna Cum Laude*, Washington & Lee University

**Affiliations**

* Beechwood Home, Board Member
* Indian Hill High School, Assistant Football Coach

Christopher M. Rowane, CFA

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 2014

Joined industry in 1983

As a Portfolio Manager, Chris works with both high net worth and institutional clients. He is active in supporting the firm’s national platform business through regular travel. Chris is a member of the Investment Committee covering part of the Consumer Discretionary sector. He is the Gatekeeper for the Mid Cap Growth strategy.

Prior to joining Bahl & Gaynor in 2014, Chris’s work included positions at Huntington Bank (Senior Vice President and Director of Portfolio Management), Firstar Bank (Vice President and Director of Portfolio Management), US Bancorp Trust Company (Assistant Vice President and Portfolio Manager) and First National Bank of Pennsylvania (Investment Officer).

**Educational Background**

* Chartered Financial Analyst® (1998), CFA Institute
* Chartered Investment Counselor (2015)
* Chartered Wealth Manager (2004), American Academy of Financial Management
* Master of Business Administration (1988), Gannon University, Concentration in Finance
* Bachelor of Science in Business Administration (1983), Gannon University, Major: Finance

**Affiliations**

* CFA Society of Cincinnati, Member
* Montgomery Community Church, Member
* Rubinstein Foundation of Cincinnati Children’s Hospital, Treasurer
* Xavier University, Williams College of Business, Student Mentor

James E. Russell, Jr., CFA

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 2014

Joined industry in 1988

As a Portfolio Manager, Jim works primarily with institutional clients along with select high net worth relationships as well as regular travel supporting the firm’s national platform business. Jim is a member of the Investment Committee covering Insurance and Medical Device industries within the Health Care sector. He is the Gatekeeper for the Global Dividend Growth strategy.

Prior to joining Bahl & Gaynor in 2014, Jim’s work included positions at U. S. Bank (Senior Equity Strategist and Regional Investment Director of US Bank Wealth Management) and Fifth Third Bank (Managing Director and Vice President).

**Educational Background**

* Chartered Financial Analyst® (1992), CFA Institute
* Master of Business Administration (1986), Emory University, Concentration in Finance
* Bachelor of Science (1983), Centre College of Kentucky

**Affiliations**

* Beech Acres Parenting Center Endowment Committee, Board Chair
* Centre College Advisory Board, Committee Member
* CFA Society of Cincinnati, Member
* Interparish Ministries, Secretary of Board and Finance Committee Member
* Saint Timothy’s Episcopal Church, Finance Committee, Board Chair
* YMCA of Greater Cincinnati, Full Board and Finance Committee Member

Christopher J. Heekin, CFP®

Vice President, Portfolio Manager & Principal

Joined Bahl & Gaynor in 2016

Joined industry in 1993

As a Portfolio Manager, Kip has a local focus working primarily with high net worth individuals and families. His expertise extends into Bahl & Gaynor’s financial planning efforts available to direct clients of the firm and includes cash flow planning, generational wealth preservation and transfer, and developing strategies for those in and working towards retirement.

Prior to joining Bahl & Gaynor in 2017, Kip’s work included positions Firth Third Private Bank (Vice President and Private Bank Team Lead), Tri-State Superior Walls, LLC (President), Arthur Anderson Corporate Finance (Senior Associate) and Fifth Third Bank (Bank Associate and Credit Analyst).

**Educational Background**

* CERTIFIED FINANCIAL PLANNER™ professional (2017), College for Financial Planning
* Master of Business Administration (1999), Darden School of Business at the University of Virginia, Concentration in Finance,
* Bachelor of Arts in Economics (1992), Duke University

**Affiliations**

* Chatfield College Board of Trustees
* Financial Planning Association (FPA) of Southwestern Ohio, Member
* Good Samaritan Hospital Foundation Board of Trustees
* United Way of Greater Cincinnati and UWGC Foundation Board of Trustees

S. Nick Brown, CFP®

Vice President & Financial Planning Specialist

Joined Bahl & Gaynor in 2017

Joined industry in 2005

As a Financial Planning Specialist, Nick has a local focus working primarily with high net worth individuals and families. His expertise is foundational to Bahl & Gaynor’s financial planning efforts available to direct clients of the firm and includes cash flow planning, generational wealth preservation and transfer, and developing strategies for those in and working towards retirement.

Prior to joining Bahl & Gaynor in 2017, Nick’s work included positions at Huntington National Bank (Wealth Advisor) and Freeman Heyne (Client Relationship Manager).

**Educational Background**

* CERTIFIED FINANCIAL PLANNER™ professional (2008), College for Financial Planning
* Bachelor of Business Administration (2004), University of Cincinnati, Major: Finance

**Affiliations**

* Financial Planning Association (FPA) of Southwestern Ohio, Member

Keith H. Rennekamp, CFA, CFP®

Vice President & Portfolio Manager

Joined Bahl & Gaynor in 2018

Joined industry in 2003

As a Portfolio Manager, Keith works with both institutional clients and high net worth relationships as well as regular travel supporting the firm’s national platform business. His expertise extends into Bahl & Gaynor’s financial planning efforts available to direct clients of the firm and includes cash flow planning, generational wealth preservation and transfer, and developing strategies for those in and working towards retirement.

Prior to joining Bahl & Gaynor in 2018, Keith’s work included positions at Huntington National Bank (Senior Portfolio Manager) and Fifth Third Bank (Portfolio Manager).

**Educational Background**

* Chartered Financial Analyst® (2010), CFA Institute
* CERTIFIED FINANCIAL PLANNER™ professional (2012), College for Financial Planning
* Master of Business Administration (2007), Xavier University, Concentration in Finance
* Bachelor of Business Administration (2002), The Ohio State University, Major: Finance

**Affiliations**

* A Kid Again, Southwest Ohio Chapter Board, Treasurer
* CFA Institute Global Research Challenge, Grader
* CFA Society of Cincinnati, Member
* Immaculate Heart of Mary Church, Fathers Team
* Xavier University, Williams College of Business, Student Mentor

Kevin T. Gade, CFA, CFP®

Vice President & Portfolio Manager

Joined Bahl & Gaynor in 2016

Joined industry in 2011

As a Portfolio Manager, Kevin works primarily with institutional clients along with select high net worth relationships. He travels regularly to support the firm’s national platform business. Kevin aids Jim Russell’s efforts in coverage of the Pharmaceutical industry.

Prior to his role as Portfolio Manager, Kevin served as a Portfolio Analyst at Bahl & Gaynor after joining the firm full-time in 2016. Prior to his full-time position at Bahl & Gaynor, he worked within Citi’s Markets and Securities Services group (Analyst). Kevin worked as a Co-Op with Bahl & Gaynor while pursuing his undergraduate degree.

**Educational Background**

* Chartered Financial Analyst® (2017), CFA Institute
* CERTIFIED FINANCIAL PLANNER™ professional (2018), College for Financial Planning
* Bachelor of Business Administration (2014), University of Cincinnati, Major: Finance & Business Economics

**Affiliations**

* Big Brothers Big Sisters of Greater Cincinnati, Big Brother
* CFA Society of Cincinnati, Member
* Cincinnati Youth Collaborative (United Way), Mentor and Young Professional Board Member
* Elder High School Young Alumni Board, Member
* Financial Planning Association (FPA) of Southwestern Ohio, Member

Samuel L. Koopman, CFP®

Vice President & Portfolio Manager & Principal

Joined Bahl & Gaynor in 2015

Joined industry in 2008

As a Portfolio Manager, Sam has a local focus working primarily with high net worth individuals and families. His expertise extends into Bahl & Gaynor’s financial planning efforts available to direct clients of the firm and includes cash flow planning, generational wealth preservation and transfer, and developing strategies for those in and working towards retirement.

Prior to his role as Portfolio Manager, Sam served as a Portfolio Analyst at Bahl & Gaynor after joining the firm full-time in 2015. Prior to his full-time positions at Bahl & Gaynor, Sam served in the United States Army as a commissioned officer achieving the rank of Captain. Sam worked as an intern with Bahl & Gaynor while pursuing his undergraduate degree.

**Educational Background**

* Chartered Financial Analyst® Level II Candidate (2018), CFA Institute
* CERTIFIED FINANCIAL PLANNER™ professional (2017), College for Financial Planning
* Bachelor of Science in Business Administration (2010), Xavier University, Major: Finance

**Affiliations**

* CFA Society of Cincinnati, Affiliate Member
* Financial Planning Association (FPA) of Southwestern Ohio, Member

Ian T. Owens

Portfolio Analyst

Joined Bahl & Gaynor in 2017

Joined industry in 2014

As a Portfolio Analyst, Ian assists portfolio managers with general investment research, portfolio management and client service. He supports many institutional operations including request for proposal processes, attribution analysis and internal research generation.

Prior to his role as Portfolio Analyst, Ian served as a Co-Op at Bahl & Gaynor while pursuing his undergraduate degree.

**Educational Background**

* Chartered Financial Analyst® Level I Candidate (2018), CFA Institute
* Bachelor of Business Administration (2017), University of Cincinnati, Major: Finance

**Affiliations**

* CFA Society of Cincinnati, Affiliate Member

Eric J. Zins

Portfolio Analyst

Joined Bahl & Gaynor in 2018

Joined industry in 2014

As a Portfolio Analyst, Eric assists portfolio managers with general investment research, portfolio management and client service. He supports many institutional operations including request for proposal processes, attribution analysis and internal research generation.

Prior to his role as Portfolio Analyst, Eric served as a Co-Op at Bahl & Gaynor while pursuing his undergraduate degree.

**Educational Background**

* Chartered Financial Analyst® Level I Candidate (2018), CFA Institute
* Bachelor of Business Administration (2018) *Summa Cum Laude*, University of Cincinnati, Major: Finance

**Affiliations**

* CFA Society of Cincinnati, Affiliate Member