

Sam is a Senior Portfolio Manager at U.S. Bank Private Wealth Management, where he develops and implements customized investment strategies for high net worth individuals and institutions.

Sam has more than 20 years of experience spanning investment management, sales and relationship management.

He earned his Bachelor's Degree in Economics from the University of California, Irvine, and his Master's Degree in Global Finance from IE Business School in Madrid.

He earned the CFA ® Charter in 2011. He also holds the Chartered Alternative Investment Analyst (CAIA), Certified Financial Planner (CFP) and the Certified Investment Management Analyst (CIMA) designations.

Sam lives in the west metro area with his wife and two young children.

In 2015, CFA Society Minnesota honored Sam as our Volunteer of the Year.

