

Amy A. Bartosh, CFA® , CAIA®

Senior Investment Advisor

PNC Institutional Advisory Solutions®



Amy is a senior investment advisor for PNC Institutional Advisory Solutions located in the Philadelphia market. She coordinates the delivery of investment solutions for various charitable organizations, endowments and foundations. Her key responsibilities include maintaining strong relationships with clients by providing thought leadership, education and insights, managing portfolios in accordance with the client's investment objectives, providing recommendations for asset allocations based upon the client's needs and supporting the development of new business relationships.

Firm Start Date

June 2005

Industry Start Date

June 2005

She assumed her current role in 2018. Previously, Amy served as a portfolio strategist for Hawthorn, PNC Family Wealth®, a business dedicated to serving the needs of individuals and families with investable assets in excess of \$20 million. She was a resource for and worked closely with investment advisors to deliver the Hawthorn integrated wealth management experience to a limited number of clients. Amy was also responsible for conducting detailed analysis of client portfolios including quantitative and returns-based analytics as well as performance attribution. Prior to that, Amy worked as a senior compliance analyst for the Drexel University College of Medicine.

Amy earned a Bachelor of Science degree in Health Administration with a minor in business from the University of Scranton, and a Master of Business Administration degree from Drexel University's Lebow College of Business. Amy holds both the Chartered Financial Analyst® and Chartered Alternative Investment Analyst® (CAIA) designations. She is a member of the CFA Institute, CFA Society of Philadelphia and Chartered Alternative Analyst Association.

Amy volunteers with the CFAP Women's Advisory Committee serving on the Inve\$t in Her Future Committee as well as Back on My Feet Philadelphia as a member of the Development Committee for their Young Leaders' Association.

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