

Stephen Campisi, Director and Consulting Strategist

Stephen Campisi is a Consulting Strategist for Institutional Investments & Philanthropic Solutions at Bank of America Merrill Lynch. He is also a Portfolio Manager with responsibility for over \$1 billion in assets for endowments, foundations and pension plans. With over twenty five years of experience in investment management, he also served as a bond portfolio manager and strategist within the insurance industry.

Mr. Campisi is a recognized authority in the area of investment performance analysis and has authored several articles on the subject. He is a frequent conference speaker on the topics of investment strategy, risk analysis and performance analysis and also participates in the CFA Institute's Speaker Retainer Program, addressing CFA Societies throughout the United States.

He is a past president of the Hartford CFA Society and has taught classes for their Chartered Financial Analyst (CFA) review course for nearly ten years. An active member of The CFA Institute for over 15 years, Steve served on their Professional Development Committee and Practice Analysis Committee.

Steve holds an MBA from the University of Connecticut and an MA in Music from Montclair State University.

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