

## DANIEL P. CUNNINGHAM, MARKET INVESTMENT EXECUTIVE



Daniel P. Cunningham is managing director and a market investment executive at U.S. Trust, Bank of America Private Wealth Management. In this role, he is responsible for determining the appropriate strategy, formulating and implementing our investment management, fiduciary, credit and banking services for Upper New England markets. He leads, coaches and manages portfolio managers by demonstrating the broad range of wealth management services while navigating through changing market environments to provide traditional guidance in the areas of asset allocation, tax-minimization strategies, retirement, and multi-generational strategies from risk based strategies to banking and lending needs.

Previously, Dan was a portfolio manager team lead.

Prior to joining Bank of America, Dan practiced law at a Boston law firm, where he specialized in estate planning and administration.

Dan earned his B.A. degree in economics and history from Boston College, his M.B.A. degree in finance from the Suffolk University Sawyer School of Management, and his law degree from the Suffolk University School of Law. Dan holds the Chartered Financial Analyst® (CFA®) designation and CERTIFIED FINANCIAL PLANNER™ (CFP®) designation. He is a member of the CFA® Institute, the Boston Security Analysts Society, and the Boston Estate Planning Council. Dan is also a board member of the American Bankers Association’s National Trust School.

Dan does not provide legal advice in his role at U.S. Trust.

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