



Jeff Mortimer

Director of Investment Strategy

Jeff Mortimer is the director of investment strategy for BNY Mellon Wealth Management. In this role, he leads a team that sets capital market expectations and is responsible for making asset allocation recommendations. Jeff has more than 25 years of experience in the financial services industry.

Prior to joining the firm, Jeff worked for Charles Schwab for 13 years in increasingly senior positions, culminating with his appointment as chief investment officer. He also worked for nearly 10 years in boutique firms in the Boston area, serving high net worth individuals and families. Jeff received a Bachelor of Science degree in finance from Babson College and a master of business administration from the University Of Chicago Graduate School Of Business. He is a CFA charter holder.

He is a national speaker on issues of investment strategy, the financial markets and the economy. He has been featured in numerous media outlets, including *Barron's*, *Fortune*, Bloomberg and CNBC.