

Greg Barshied, CFA



Associate Portfolio Manager

As Associate Portfolio Manager, Greg is responsible for the management of client portfolio assets within their established investment objectives. He is also responsible for conducting equity research in support of the company's proprietary Core Equity strategy. He monitors current holdings of the Core Equity strategy, while sourcing ideas for potential additions or deletions. Greg serves as a member of the company's investment committee, contributing to decisions on market outlook, investment policy design, asset allocation, model portfolio construction, and third-party manager engagements for specialty asset classes that complement the firm's proprietary equity strategy.

Experience

Legacy Trust, 2019 – Present
Citigroup Global Markets, 2012 – 2017
Boston College Finance Department, 2010 - 2011

Certification

Chartered Financial Analyst

Education

B.S., Boston College

Community Involvement

CFA Society of West Michigan - Member

