



EXPERT PANELIST BIO: **Joseph Curtin**

Joseph Curtin is a Managing Director and Head of Portfolio Management for the Chief Investment Office (CIO) within Bank of America Corporation supporting Bank of America Private Bank and Merrill. In this role, Joe is responsible for managing equity and multi-asset model portfolios across the wealth management businesses. Joe is a voting member of the Global Wealth & Investment Management Investment Strategy Committee (GWIM ISC), head of the GWIM Investment Management Committee and a voting member of the GWIM Portfolio Construction Committee.

Previously, Joe led a multi-disciplinary group of professionals to define and deliver an investment platform for Bank of America Private Bank, which included open architecture and simulation models to develop and report on asset allocation plans. He also headed up the Outsourced CIO Group, which serves endowments, not for profits and defined benefit plan sponsors.

Prior to joining Bank of America, Joe was a senior consultant at PricewaterhouseCoopers, working in the Financial Planning Solutions, Personal Financial Services and International Assignment Solutions department.

Joe received his B.B.A. in Accounting from Pace University. He is a member of the President's council for Pace University.