

Plimoth Investment Advisors[®]

Investment Management & Trust Services

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Steve has over 25 years of experience in managing investment portfolios. He has worked at some of the largest investment institutions worldwide including, Scudder, Stevens & Clark and State Street Global Advisors, where he served as a Senior Portfolio Manager. In his prior role at Plimoth, Steve oversaw the development of Plimoth's proprietary economic and investment analytics programs which serve as the backbone of their investment decision platform.

As President and CEO, Steve is currently responsible for the development of the organization and oversight of all internal functions performed by the firm's operating divisions. Steve continues to be a member of the investment management team and manages client portfolios. He earned a Bachelor of Science in economics and a Master of Science in finance, both from Suffolk University. He is also a graduate of the ABA Stonier Graduate School and the Wharton Leadership Program. Steve is the recipient of the Chartered Financial Analyst (CFA) designation from the CFA Institute, and is a member of the CFA Institute and the Boston Security Analysts Society.

Steve grew up on the South Shore and currently resides in the town of Bridgewater with his wife and two teenage children. In his spare time Steve enjoys boating and can often be found at tennis courts around the state, watching his children compete in both High School and USTA tournaments.

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