LSIA
Wealth & Institutional

Jay E. Van Cleave, CFA

Partner

Investment Experience: 34 years
Years with Firm: 16 years

As a partner and founding member of LSIA, Jay works closely with institutions and individuals to build custom portfolios. Jay's experience as a portfolio manager and research analyst provides his clients with a comprehensive viewpoint when building an asset allocation to fit their specific investment objectives.

Jay leads LSIA's asset allocation team, a group dedicated to establishing the firm's overall asset allocation strategy and is a member of the firm's equity team, where he helps establish the firm's equity security positions.

Prior to starting LSIA, Jay managed investment portfolios as part of Portfolio Management Partners, a former division of Natixis Asset Management Advisors, LP (2006-2008) and Loomis, Sayles & Company, LP (2002-2006). Before joining Loomis Sayles, Jay was a Senior Vice President and Securities Analyst with Robert W. Baird & Co., Inc. (1984-2001), providing research analysis for the consumer/ retail sector and emerging growth stocks, as well as serving on the firm's investment policy committee.

EDUCATION AND ACCREDITATIONS

MBA - University of Wisconsin

BBA - University of Wisconsin

Chartered Financial Analyst®

PROFESSIONAL AFFILIATIONS

CFA Institute - Member

CFA Society of Milwaukee - Member

Years with Firm include tenure at LSIA; Portfolio Management Partners (formerly a division of Natixis Asset Management Advisors, LP, now Ostrum Asset Management); and Loomis, Sayles & Company, LP. Both Loomis, Sayles & Company, LP and Ostrum Asset Management are affiliates of Natixis Investment Managers.