LSIA
Wealth & Institutional

Rebecca A. Mueller

Executive Assistant

Investment-related Experience: 21 years
Years with Firm: 21 years

As an Executive Assistant with LSIA, Becki is responsible for client portfolio administration within our firm's Milwaukee office. In this critical role, she handles a variety of operational and administrative tasks, including client portfolio analysis and account reconciliation, client report and meeting book preparation, document retention and recordkeeping and client relationship management database maintenance, among others. Additionally, she supports LSIA's Equity Trader and Director, Operations, serving as a primary back-up for equity trading and assisting with new account procedures.

Working closely with portfolio manager, Jay Van Cleave, Becki is part of a collaborative team that is committed to serving both individual and institutional clients with the highest standard of care. Her role involves communicating with clients, as needed, and often acting as a point of contact between Jay and the client custodians to ensure funds are properly handled in accordance with client directives.

Prior to joining LSIA, Becki worked alongside Jay as an Executive Assistant with Portfolio Management Partners, a division of Natixis Asset Management Advisors LP (2006-2008) and Loomis, Sayles & Company, LP (1997-2006). Before joining Loomis Sayles, Becki served as a loan customer service representative for a small, Milwaukee-based credit company.

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.