LSIA
Wealth & Institutional

Mark A. Shank, CFA, CIC

Managing Partner & Chief Investment Officer

Investment Experience: 37 years
Years with Firm: 35 years

As Chief Investment Officer and a founding member of LSIA, Mark oversees the firm's equity, fixed income and asset allocation investment processes, which are designed to provide clients with efficiency, accountability and transparency. Drawing on his experience as a former CPA, Mark works closely with institutions and individuals to provide comprehensive, customized portfolio management with an emphasis on tax considerations.

Prior to starting LSIA, Mark 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 (1983-2006). Before joining Loomis Sayles, Mark was an Equity Analyst for Northwestern Mutual Life Insurance (1981-1983) covering the defense, healthcare and industrials sectors and Auditor for Peat Marwick (1979-1980).

Mark is active in his community and is the Past President of Future Milwaukee and Walker's Point Youth and Family Center.

EDUCATION AND ACCREDITATIONS

MS - University of Wisconsin
BSBA - Drake University
Chartered Financial Analyst®
Chartered Investment Counselor

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.