1847 Private Client Group

# Joe Bonfanti, CFA®

PARTNER, INVESTMENT ANALYST

## contact


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## education and qualifications

- B.A. Finance and International Business, The University of Maryland, College Park
- Chartered Financial Analyst (CFA®)
- Series 7 and 66 Licensed
- Life, Health and Accident Licensed

## areas of expertise

- Portfolio Design
- Risk Management Strategies
- Investment Research
- Asset Management
- Personal Finance

## about

Joe Bonfanti is the Investment Analyst for the 1847 Private Client Group. He works with his team's clients designing, implementing, and reviewing their individual portfolios to help reach their financial goals. Joe also heads 1847Financial's Investment Department and its underlying Investment Committee, which oversees a lineup of allocation-driven portfolios built for investors of varying risk profiles and financial situations. In his roles, Joe focuses on the analysis of fund-based investment strategies, evaluation of third-party asset managers, portfolio construction decisions for the Investment Committee's model lineup, and investment platform guidance for individual investors.

Joe received the Chartered Financial Analyst (CFA®) designation in January of 2018. The charter is recognized globally by employers, investment professionals, and investors as the definitive standard by which to measure the competence, integrity, and dedication of serious investment professionals. Joe is a graduate of the University of Maryland, College Park with a Bachelor's Degree in Finance and International Business. He is Series 7, 66, and Life, Accident and Health licensed.

Joe currently resides in Philadelphia, PA. When he is not hard at work, you can find him overanalyzing 76ers games, learning to cook, or spending time with friends and family.