

Joel Tillinghast, CFA

Senior Advisor
Fidelity Investments

Joel Tillinghast is a senior advisor in the Equity division at Fidelity Investments. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, and individuals.

Prior to assuming his current role, Joel was a portfolio manager covering Fidelity Low-Priced Stock Fund from December 1989 to December 2023. Before joining Fidelity in 1986, Joel held various other positions, including director of research and strategy at Bank of America Futures, research economist at Drexel Burnham Lambert, and analyst at Value Line Investment Survey. Joel joined Fidelity in 1986 and has been in the financial industry since 1980.

Joel earned his Bachelor of Arts from Wesleyan University and his Master of Business Administration from Kellogg School of Management at Northwestern University.

Professional Designations:

Chartered Financial Analyst (CFA)

The Chartered Financial Analyst (CFA) designation is offered by the CFA Institute. To obtain the CFA charter, candidates must pass three exams demonstrating their competence, integrity, and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management, and security analysis, and must also have at least 4,000 hours of qualifying work experience completed in a minimum of 36 months, among other requirements. CFA® is a trademark owned by CFA Institute.

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