

Kevin Walsh, CFA, CAIA

Client Portfolio Manager
Fidelity Investments

Kevin Walsh is a client portfolio manager for Wealth Advisory Managed Solutions at Fidelity Institutional Wealth Advisor LLC (FIWA)SM, the registered investment adviser at Fidelity Institutional[®] (FI). Fidelity Institutional is a division of Fidelity Investments that offers investment insights, strategies, and solutions, as well as trading services to a wide range of wealth management firms and institutional investors. 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.

In this role, Mr. Walsh represents and co-manages FIWA's turnkey model portfolios: Fidelity Target Risk Blended, Fidelity Target Risk ETF, Fidelity Model Portfolio with SMAs, and the newly created Fidelity Model Portfolio with Private Markets. He is responsible for delivering FIWA's investment philosophy, process, and strategies to a wide range of clients.

Prior to assuming his current responsibilities, Mr. Walsh was a principal fund research analyst, where he led the multi-asset research efforts. During his time as a research analyst, he was responsible for coverage of model portfolios, target date funds, balanced funds, and retirement income strategies. He has been in the financial industry since joining Fidelity in 2013.

Mr. Walsh earned his bachelor of science degree in business administration with a focus in finance from Stonehill College. He also holds the Financial Industry Regulatory Authority (FINRA) Series 7, 24, and 63 licenses. He is a CFA[®] charterholder and Chartered Investment Analyst (CAIA).

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.

Chartered Alternative Investment Analyst (CAIA) is offered by the Association of Chartered Alternative Analysts. Candidates are expected to understand the basic concepts of finance and quantitative analysis and need to pass two exams. One year of professional experience with a bachelor's degree or four years of professional experience without a bachelor's degree is required. Professional experience is defined as full-time employment in a professional capacity within the regulatory, banking, financial, or related fields.

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