

JohnPatrick Squillace, CAIA

Portfolio Solutions Consultant

Fidelity Investments

JohnPatrick Squillace is a portfolio solutions consultant on the Portfolio Construction Guidance (PCG) team for Wealth Advisory and Portfolio Solutions 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. Squillace assists the nation's leading investment professionals to resolve their broadest portfolio concerns. As part of the PCG team, he partners with Fidelity's sales and relationship management teams to arm investment professionals with the tools, know-how, and confidence they need to build robust model portfolios and explain them to their clients. Additionally, the PCG team leverages and builds upon Fidelity's extensive experience in multi-asset, multi-manager, and multi-horizon portfolio construction. Since its inception in 2013, the PCG team has crafted over 20,000 custom-tailored portfolio reviews while also contributing to unique research and analytics around asset allocation, strategies, and risk.

Prior to joining the Portfolio Solutions team, Mr. Squillace worked as an internal wholesaler covering the Boston metro and Rhode Island, where he partnered with regional directors to provide investment solutions and capital markets insights to investment professionals. Mr. Squillace has also held roles in Fidelity's retail branch network. He has been in the industry since 2017.

Mr. Squillace earned his bachelor of arts degree in political science from Hobart and William Smith Colleges. He holds the Financial Industry Regulatory Authority (FINRA) Series 7 and 63 licenses and is also a CAIA® charterholder.

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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