

Matthew Kobata, CFP®

Regional Director

Fidelity Investments

Matthew Kobata is a regional director for the Intermediary Investment Client Group 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. Kobata is responsible for the sale of Fidelity mutual funds, ETFs, SMAs, alternatives, and other investment products and services through financial institutions, planners, registered investment advisors, insurance firms, and various other intermediary channels in Los Angeles.

Prior to assuming his current position, Mr. Kobata spent 13 years at American Century Investments and also has experience working at PIMCO, AIM Investments, and SunAmerica over his 28 financial service career.

Mr. Kobata earned his bachelor of science in business administration and economics degree with a minor in marketing from California State University Northridge. He holds the Financial Industry Regulatory Authority (FINRA) Series 6, 7, 63, and 66 licenses and is a Certified Financial Planner, CFP®.

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