



Andrew Calleri

Director, Relationship Manager

Fidelity Investments

Andrew Calleri is a director and senior relationship manager for Fidelity Wealth and Brokerage Platform (WBP) in Institutional Wealth Management Services, which offers wealth management professionals and firms access to the investment, technology, and platform solutions they need to serve their investor clients and grow their businesses. Institutional Wealth Management Services is a part of Fidelity Investments, a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, family offices, and individuals.

In this position, Mr. Calleri supports clients in partnership with their vice president, relationship manager. The relationship management team works with their clients to meet their business goals and provide them with solutions across technology, practice management, investments, and other items related to clearing and execution.

Before joining Fidelity, Mr. Calleri spent nearly thirteen years at Pershing LLC, where he played a pivotal role in supporting institutional clients and driving operational excellence. He also spent seven years at Schwab Advisor Services, further honing his skills in delivering high-impact solutions to financial advisors and their clients.

Mr. Calleri holds a bachelor's degree in international business and an MBA in finance from Stetson University. He also holds the Financial Industry Regulatory Authority (FINRA) Series 7 and 63 securities licenses.

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