

## Robert Szeles, CFA



Robert currently serves as Portfolio Manager and Analyst. He is a member of the firm's investment committee and holds the responsibility for making investment recommendations in the Consumer Discretionary, Consumer Staples, and Health Care sectors.

Bob spends his time collaborating with individuals, families, and institutions to provide customized solutions for each client's specific needs; with special consideration for tax and estate circumstances, risk tolerance, and spending needs. Each portfolio consists of individual stocks and bonds that incorporate the ideas of the investment committee.

Bob also leads the expansion and development of the institutional segment of Beese Fulmer; working with an array of institutions and their respective consultants to communicate our investment process and philosophy.

Bob lives in Richfield, Ohio with his wife Lindsay and two children – Coleman and Blake. In his free time, he enjoys exploring the metro parks with his family, playing golf, and competing in triathlons.

### Experience

Prior to joining Beese Fulmer, Bob spent nearly a decade on a top-rated international equity team. The team was acquired by Federated Hermes from PNC Capital Advisors in 2019 and worked out of the Cleveland offices of both firms. While at Federated Hermes, Bob was a Senior Investment Analyst supporting three mutual funds with global equity exposures. Bob frequently traveled throughout Europe, meeting with senior management to better understand the long-term implications of current decision-making and perform due diligence. In addition, he attended conferences with forums from central bank leaders, geopolitical experts, and senior company management.

Bob worked with product management and sales to understand the needs of institutional clients. He supported the development of new product launches which required working with experts in fund accounting, legal, product, sales, and executives to bring new mutual funds to market. Assets under management for his team grew from \$400 million in 2013 to \$1.7 billion in 2021, due to new products, improved marketing tools, and a strong understanding of client needs.

### Education

CFA Charter Holder, CFA Institute, Awarded 2015

John Carroll University, Bachelor of Science in Business Administration, Finance, Cum Laude

### Civic Involvement and Awards

St. Bernard of Akron Hot Meals

CFA Society of Cleveland Member