

Relationship Management

From the initial touchpoints of our sales teams to the cultivation and support of long-term relationships by our client service team, ClearBridge strives to create success and stability for our clients. We do this by delivering superior client service throughout the entire investment experience.

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Lori McEvoy
Head of Institutional Sales

31 Years experience
3 Years at ClearBridge

"Institutional investors have a depth of knowledge and experience that lets them understand what is behind the numbers. Our job is to share that story with them."



Vinay Nadkarni
Head of Portfolio Specialists

24 Years experience
21 Years at ClearBridge

"Through close collaboration with our investment team, we strive to give our clients perspective on both general markets and specific positioning in our portfolios."



Kathleen Anderson
Product Specialist

21 Years experience
21 Years at ClearBridge



Timothy Angeloni
Client Service Manager

16 Years experience
15 Years at ClearBridge



Wendy Back
Client Service Manager

19 Years experience
19 Years at ClearBridge



Evelyn Cabrera
Client Service Manager

26 Years experience
10 Years at ClearBridge



David Chow
Institutional Sales
Manager

23 Years experience
11 Years at ClearBridge



Mike Coolahan
Marketing and Client
Service Manager

21 Years experience
9 Years at ClearBridge



Bayley Davis
Senior Portfolio Specialist

25 Years experience
5 Years at ClearBridge



Terence Fennessy
Institutional Sales
Manager

21 Years experience
3 Years at ClearBridge



Robin Freeman
Portfolio Specialist

11 Years experience
7 Years at ClearBridge



Nicole Freemyer
Client Service Associate

2 Years experience
1 Year at ClearBridge



Kenny Fung
Account Transition
Manager

11 Years experience
5 Years at ClearBridge



Raisa Gusakova-Rivero
Client Service Manager

11 Years experience
9 Years at ClearBridge



Corey Hardie
Portfolio Specialist

6 Years experience
3 Years at ClearBridge



Robert Johanson
Senior Portfolio Specialist

24 Years experience
23 Years at ClearBridge



Jeffrey Layn
Senior Portfolio Specialist

27 Years experience
9 Years at ClearBridge



Pankaj Naik, CFA
Senior Portfolio Specialist

20 Years experience
1 Year at ClearBridge



Lindsay McCulla
Institutional Sales
Associate

9 Years experience
3 Years at ClearBridge



Ellen Owens
Client Service Manager

23 Years experience
24 Years at ClearBridge



Jessica Rinchiuso
Account Transition
Manager

13 Years experience
13 Years at ClearBridge



Stephanie Rubin
Client Service Manager

14 Years experience
8 Years at ClearBridge



James "Doc" Savage
Institutional Sales
Manager

34 Years experience
5 Years at ClearBridge



Jeffrey Schulze, CFA
Investment Strategist

12 Years experience
3 Years at ClearBridge



Nicole Tarallo
Head of Client Service

27 Years experience
27 Years at ClearBridge



Ryan Virag, CFA
Client Portfolio Manager

17 Years experience
5 Years at ClearBridge



Charlotte Walsh, CFA
Institutional Sales
Manager

28 Years experience



Kathryn Walsh
Portfolio Associate

21 Years experience
21 Years at ClearBridge



Timothy West
Institutional Sales
Manager

31 Years experience
6 Years at ClearBridge



Juliet Willetts
Relationship Manager

34 Years experience
30 Years at ClearBridge