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Let's start a conversation

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- **Actionable ideas** to grow your business
- **Access** to our investment teams
- **Easy-to-tailor content** to showcase your value

Casey is responsible for defining, prioritizing and executing the product positioning for all BMO Global Asset Management U.S. strategies with the purpose of maximizing distribution opportunities. Casey joined the company in 2013.

Prior to joining BMO, Casey worked in product development at Neuberger Berman. Previously, he worked directly with high-net-worth clients on their banking and investment needs at Wells Fargo Bank.

Casey holds a B.S. in financial services from Westminster College. He is a

Certified Financial Planner™ professional and carries the Series 7 and 66 licenses. Casey also serves as a member of the ICI research committee and is a member of the CFA Society of Chicago.



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