

Ali Caffery
Associate Portfolio Manager

Biography

Ms. Caffery is an Associate Portfolio Manager for Envestnet | PMC's Enterprise Solution and Foundation & Endowment programs. Ms. Caffery joined Envestnet in June 2012. Her responsibilities include asset allocation, manager selection and due diligence, and portfolio administration for multiple portfolios managed by PMC. Prior to her current role, Ms. Caffery created and launched several strategic initiatives for Envestnet including an Endowment & Foundations program, a series of institutional portfolios, and a Donor Advised Fund. Ms. Caffery received a BSBA in Finance and Business Management from the University of Denver and has earned the Global Financial Steward designation.