



# CONFERENCE

APRIL  
25-27

20 X 18

SAN DIEGO  
CALIFORNIA

HILTON SAN DIEGO BAYFRONT

## **Jeffery Kleintop, CFA**

Chief Global Investment Strategist

Charles Schwab & Co. Inc.



As Chief Global Investment Strategist at Charles Schwab, Jeffrey Kleintop analyzes and discusses international markets, trends and events to help U.S. investors understand their significance and financial implications. In this role, Kleintop provides research, commentary and actionable insights to Schwab's client-facing teams and the firm's Investor Services and Advisor Services clients through written reports, video content, conference calls, webcasts and in-person events.

Kleintop is frequently cited in a range of national media outlets including The Wall Street Journal, The New York Times, Barron's and Financial Times, and he is a regular guest on high profile news networks including CNBC, Bloomberg, Fox Business News, PBS and ABC News. Kleintop has been cited in The Wall Street Journal as one of "Wall Street's best and brightest," and he has been a featured or keynote speaker at dozens of industry events annually including the Barron's Top Financial Advisor Summit and the Financial Planning Association annual conference.

Prior to joining Schwab, Kleintop served as chief market strategist at LPL Financial. Earlier in his career he was chief investment strategist at PNC Wealth Management and senior investment strategist at ARIS Corporation of America. Kleintop is the author of *Market Evolution: How to Profit in Today's Changing Financial Markets*, which was published in 2006.

Kleintop earned his B.S. degree in Business Administration from the University of Delaware and received his M.B.A. degree from Pennsylvania State University. He also studied at the London School of Economics and is a Chartered Financial Analyst (CFA).