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Mike Stephens

Portfolio Consultant

John Hancock Investments



Mike Stephens is a Portfolio Consultant for John Hancock Investments. In his role, Mike provides consultative, analytical and educational portfolio construction guidance to financial advisors. The portfolio construction guidance Mike delivers is informed by the broader John Hancock Investments organization which is a world-class provider of asset management solutions, utilizing a unique best-of-breed, “manager of managers” model with an asset allocation mindset. In a previous role at John Hancock, Mike was responsible for defining, articulating and promoting the value proposition and investment strategy of John Hancock’s alternative and asset allocation products (\$8 billion in AUM) in both the Retail and Institutional marketplace. In addition, Mike led the development of the firm’s messaging and education on the utilization of alternative investments.

Previously, Mike was the co-founder of an RIA technology start-up that delivered customized asset allocation solutions on-line. Prior to that, Mike spent 14 years at Fidelity Investments in a number of roles. As a Portfolio Specialist for Fidelity’s Emerging Markets Equity Team, he supported both portfolio managers and distribution partners with portfolio analysis and asset class research. Prior to that, Mike was an institutional investment consultant in Fidelity’s 401k distribution channel, where he provided fund analysis and plan design consultation for plan sponsors with an aggregate \$4 billion in total net assets with Fidelity.

Mike holds the Chartered Financial Analyst designation and is a member of the Boston Security Analysts Society and of the CFA Institute. In addition, he holds the Chartered Alternative Investment Analyst designation and is a member of the CAIA Association.

Education: B.S. Finance & Economics, Miami University

Joined Manulife Financial: 2011

Began Investment Career: 1993



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