



Liz Ann Sonders

Senior Vice President, Chief Investment Strategist, Charles Schwab & Co., Inc.



As Chief Investment Strategist at Charles Schwab, Liz Ann has a range of investment strategy responsibilities reaching from market and economic analysis to investor education, all focused on the individual investor. She analyzes and interprets the economy and markets on behalf of Schwab's clients. The output of Liz Ann's work is via written reports, audio and video recordings, conference calls, and webcasts. She is a regular contributor to Schwab's publications and the keynote speaker at many of the company's corporate and client events. She is also a keynote speaker at many outside conferences, including for *Barron's*, NYSSA, FPA, CFA Institutes, Morningstar and IMCA.

In 1999, Liz Ann joined U.S. Trust—which was acquired by Schwab in 2000—as a Managing Director and member of its Investment Policy Committee. Before U.S. Trust, Liz Ann was a Managing Director and Senior Portfolio Manager at Avatar Associates (1986-1999), an original division of the Zweig/Avatar Group. She is a regular guest and guest host on many CNBC programs, as well as on Fox Business News, *Nightly Business Report*, Bloomberg TV & Radio, CNN, *Wall Street Week*, *PBS NewsHour*, Yahoo! Finance and TheStreet.com. She was a regular panelist and guest host on PBS's original *Wall Street Week With Louis Rukeyser*. Liz Ann is also regularly quoted in financial publications including *The Wall Street Journal*, *The New York Times*, *Barron's*, *Financial Times*, *Market Watch* and *Associated Press* articles.

Liz Ann has been named one of *SmartMoney's* "Power 30," their list of the most influential people on Wall Street; the best strategist of the year by *Kiplinger's*; one of the "25 Most Powerful Women in Finance" by *American Banker/US Banker*; and one of the "50 Top Women in Wealth" by *Wealth Manager/AdvisorOne*. Most recently, she was named to the "IA 25" by *Investment Advisor*, their list of the 25 most important people in and around the financial advisory profession.

In 2005, Liz Ann was appointed to and served on the President's Advisory Panel on Federal Tax Reform, President Bush's bi-partisan tax reform commission. From 2007 through 2013 Liz Ann served on the national board of directors for the Make-A-Wish Foundation of America; and now serves on its CT Chapter's board. In 2008 Liz Ann was honored by the Girl Scouts of New York as an "Exceptional Role Model for Young Women."

Liz Ann received her B.A. in economics and political science from the University of Delaware, and has served on its Investment Visiting Committee since 2000. In 2013 Liz Ann was inducted onto the University's "Alumni Wall of Fame" alongside Vice President Joe Biden and New Jersey Governor Chris Christie; and gave the Winter Commencement Address in 2014 for which she received an honorary doctorate degree. She received her M.B.A. in finance from Fordham University's Gabelli School of Business.