Lowell Blake

www.lowell-blake.com

Jonathan M. Bentley, CFA

RESEARCH DIRECTOR & PORTFOLIO MANAGER

Directions

Phone: 617-422-0064 | Email: jbentley@lowell-blake.com

Services

Investment Management

Financial Planning

Personal Trusts & Fiduciary Services

Clients

Law Firms

Foundations, Endowments & Charities

Individuals & Families

Overview

Jonathan analyzes markets and companies for investment opportunities based on research related to management, financial results, innovation, and macroeconomic trends.

Prior to joining LBA, Jonathan worked as an Equity Research Associate at SVB Leerink on the team covering the Healthcare IT and Distribution groups. Prior to Leerink, Jonathan was an Investment Analyst at Tetrem Capital Management, a long-only value fund.

He has passed all three levels of both the Chartered Financial Analyst (CFA) and Certified Market Technician (CMT) programs in succession. He is an affiliate member of the CFA Society Boston and the CFA Institute.

Jonathan earned his B.A. in Economics from Boston College.

 | T 617-422-0064 | 617-422-0744