

Jason thrives on creating investment programs for institutional investors, particularly non-profits and pensions. He advises investment committees on the management of their programs. Jason established our Philadelphia office in order to serve a growing client base.

Prior to joining FiduciaryVest, Jason worked on the buy side with the large cap equity team at Chartwell Investment Partners. Now at FiduciaryVest, he applies this experience and passion towards uncovering disciplined managers throughout the marketplace.

Jason continually demonstrates thought leadership relating to innovative investment ideas, specifically in the area of asset allocation. He is a regular guest speaker and panelist before investment conferences nationally.

Jason graduated from Vanderbilt University with a degree in mechanical engineering. He earned his MBA from the University of North Carolina Kenan-Flagler Business School, where he was also awarded the North Carolina Treasury Management Fellowship. Currently, Jason is a CFA® Charterholder and is a member of the CFA Society of Philadelphia.

In his spare time, Jason races sailboats and skis with his children. He also enjoys dressing up for dinner dates with his wife. He is a Philadelphia sports fan and a passionate Tarheel.