



CAMPBELL NEWMAN

CAMPBELL NEWMAN ANNOUNCES EXPANSION OF INVESTMENT TEAM

FEBRUARY 23, 2021

Milwaukee, Wisconsin – Jeremy A. Ellis, CFA has been hired by Campbell Newman Asset Management, Inc. in the role of Associate Portfolio Manager/Analyst.

An industry veteran with 13 years of experience as an Equity Analyst and Portfolio Manager, Ellis brings to Campbell Newman a shared investment philosophy and solid record of success. He spent the last five years at Baird as a Portfolio Manager and Equity Analyst for the Baird Rising Dividend Portfolio and the Baird Recommended Portfolio. Prior to that, he held equity research positions in Chicago at United Capital Financial Advisers and Spot Trading LLC. Mr. Ellis graduated with a BS degree in Finance from the University of Wisconsin-La Crosse and is a Chartered Financial Analyst charterholder. In addition, he has passed Level II of the Chartered Market Technician Exam.

Ellis joins the firm’s seasoned team of three Portfolio Managers/Analysts, each with more than 30 years of industry experience and over 15 years of working together: Mary C. Brown, CFA, Rimas M. Milaitis and Thomas H. Bolgert, CFA. In this newly created position, Mr. Ellis will perform equity research and serve initially as a non-voting member on the Investment Committee.

“Having successfully managed a similar U.S. large cap dividend growth portfolio, Jeremy possesses a wealth of knowledge and experience enabling him to contribute to the team’s due diligence process from day one,” noted Director of Research Rimas Milaitis. “Additionally, we expect him to offer a fresh perspective and voice to the deliberation of new ideas and portfolio positioning.”

Mary Brown, CN President, added, “We could not be more pleased to be able to recruit a person of Jeremy’s caliber as we grow our business and plan for the future. He possesses the investment acumen we require, along with an enthusiasm for the business and serving clients that set him apart. We see Jeremy fitting exceptionally well in the client-focused, team-based Campbell Newman culture.”

ABOUT CAMPBELL NEWMAN

Campbell Newman is a 100% employee-owned, boutique investment management firm serving institutional and high net worth clients with approximately \$1.7 billion in assets under advisement as of 12/31/20. The firm offers two products – Large Cap Dividend Growth and Small Cap Growth. Both strategies feature high-quality biased, high conviction portfolios and the Firm’s edge: “judgment backed by experience.” Importantly, our firm’s culture is built on five core values – client focused, stewardship, transparency, integrity and teamwork.

For more information, contact John Bonnell at (414) 635-1002 or jbonnell@campbellnewman.com.