



Rocky A. Byrd, CIMA®

Senior Portfolio Analyst

Rocky Byrd, CFA®, CIMA®, is a Senior Portfolio Analyst on the Portfolio Management team, bringing high-quality service to the firm's clients and their goals. Since arriving in 2019, Rocky has been responsible for investment research, development, and execution. He continues to provide a detailed focus and data-driven mindset to the firm's Investment Policy Committee.

Rocky previously worked with Stifel Nicolaus as a Portfolio Analyst, defining and improving operational processes, researching investment alternatives, and supporting asset allocation management for high-net-worth individuals and institutions. Rocky also gained valuable experience working at a start-up consulting firm as a Financial and Data Analyst. Here, he assessed business models, built and queried databases for automated reports, and programmed statistical models to analyze performance. This background in financial forecasting, reporting, and statistical analysis has shaped a mindset rooted in strategy, logic, and critical thinking.

Studying finance and economics at Taylor University, Rocky graduated Magna Cum Laude in 2016 with an ambition for investment analytics. Rocky was a member of the Taylor Student Endowment Fund for three years, researching and reporting on fixed income, international equity, and domestic equity funds. While participating on the Men's soccer team, Rocky was recognized as a three-year starter, captain his senior year, selected as a member of the Taylor Athletic Advisory Council, and acknowledged as an academic all-American.

Rocky and his family reside in Indianapolis, where he grew up. He graduated from Covenant Christian High School and was an active participant and coach in youth club soccer in the area. Rocky loves to learn, stay active, and spend time with friends and family. He enjoys participating in and watching sports such as basketball, soccer, and football.



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