

GREGORY M. ESTES, CFA

Senior Portfolio and Relationship Manager, May Barnhard Investments | Director - Wealth Management and Financial Planning Services



Contact

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Qualifications

- Chartered Financial Analyst (CFA)

Expertise

- Comprehensive Financial Planning
- Investment Management
- Wealth Management

Education

- M.A. Finance, University of Florida – Gainesville
- B.A. Finance, University of Notre Dame

Gregory M. Estes, CFA is a senior portfolio and relationship manager at May Barnhard Investments, the wealth management subsidiary of Councilor, Buchanan & Mitchell (CBM), and a director of wealth management and financial planning services at CBM. He has nearly 30 years of building successful client relationships, managing portfolios, developing client investment strategies, equity research and leading compliance-based risk management strategies. He is responsible for overseeing the wealth management goals of MBI's high net worth clients by speaking regularly with individuals or families to cultivate relationships, and by providing customized research, analysis and informed guidance aligned with their unique preferences.

Before joining CBM, Greg served as portfolio manager and chief compliance officer for a boutique asset management firm with more than \$415 million in assets under management that serves high net worth families and institutions. In this role, he developed client investment strategies and managed fund investments. He was also involved in actively developing new client relationships, presenting client investment reviews and providing advice to clients on investment policy compliance, performance and capital market outlooks.

Greg has additional experience serving as a portfolio manager for a capital management firm and a banking institution executing investment management decisions, providing risk management and performing asset valuations for investments and cash flow-modeled business valuations.

He has managed the development of socially responsible investment strategies for clients and served as a mentor and coach for junior analysts.

Gregory M. Estes, CFA

Professional Associations and Activities

- Greater Washington Society of CPAs (Member)

Recent Presentations and Articles

- Year-End Tax Planning and Market Update *(11.29.23 & 12.5.23)*
- Quarterly Market Investment Update and Important Financial Considerations *(11.9.23)*

Read more about Gregory M. Estes at www.cbmcpa.com/people/gregory-m-estes/.