

Marc A. Doss CFA®, CFP®

*Regional Chief Investment Officer
Western Region
Wells Fargo Private Bank*



Marc A. Doss is the regional chief investment officer and a managing director for Wells Fargo Private Bank in the Western Region. He leads a team of investment professionals who deliver comprehensive, custom, diversified portfolio management for clients of The Private Bank. In his role, Mr. Doss serves as the investment thought leader in the region by providing insight and interpretation of the economy and financial markets at client events and through written commentary. He serves on the Private Wealth Management Investment Oversight Committee, the Asset Allocation and Portfolio Construction Working Groups and the Fiduciary Oversight Committee.

Prior to his current role, Mr. Doss served as senior director of investments for the Southwest region and the regional investment manager for the San Diego Wealth Management Group. Prior to joining Wells Fargo, he worked as a managing director at Lehman Brothers and U.S. Trust. Mr. Doss has 27 years of experience in financial services and has been featured in various media outlets, including *The Wall Street Journal*, *Dow Jones MarketWatch*, *CNBC.com*, *U.S. News & World Report*, and *Bloomberg*.

Mr. Doss earned a Juris Doctor from the University of San Diego School of Law, Bachelors of Science in Economics and Political Science from the University of Illinois, is a CFA® Charterholder, and holds the Certified Financial Planner™ (CFP®) designation. He is a former trustee for the San Diego County Retirement Association (SDCERA) and previously served as the president of the CFA Society of San Diego. He served four years of active duty in the United States Navy and eight years in the reserves as a U.S. naval officer. Mr. Doss is based in San Diego, California.

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