



## **East Bay Financial Services Announces New Partner Eric Stein, CFA**

October 4, 2018

Charleston, SC and Charlotte, NC—East Bay Financial Services, LLC, an investment consulting firm dedicated to bringing sound strategy and research solutions to wealth advisors and financial planners, announced that Eric Stein, CFA, will be joining East Bay as a Partner.

Stein brings vast industry experience in areas such as asset allocation, portfolio construction and manager due diligence. Throughout his various roles he has also had the opportunity to cover many different types of client types, asset classes and vehicles. He has also led advisors and their clients through numerous market cycles and events.

“We are beyond excited to bring Eric into the East Bay family” said Mario Nardone, CFA, Founder of East Bay. “Eric brings an abundance of knowledge and experience with him. With his addition, we have greatly increased our ability to provide our clients with the expertise and hands-on-approach they expect. We are also confident his addition helps our clients focus on what they do best, developing deeper client relationships and growing their businesses.”

Stein has extensive experience developed through the variety of roles he has held during his career including being a Vice President at Goldman Sachs Asset Management, where he earned his Chartered Financial Analyst (CFA) designation in 2001. He also served as the Chief Investment Officer for RSM U.S. Wealth Management for over ten years, providing strategic leadership and solutions for their national investment platform. Most recently he worked with Nuveen where he was focused on business intelligence and strategy.

Learn more about East Bay Financial Services at [www.eastbayfs.com](http://www.eastbayfs.com)



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