

Douglas J. Roman, CFA, CMT



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Industry Experience: 26 years
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Doug, a managing director, developed the Large Cap Advantage Equity investment process and is the portfolio manager for the Large Cap Advantage core, growth, and value portfolios. He is responsible for directing the quantitative efforts of the Large Cap Advantage team and overseeing the respective research group. Prior to joining the firm in 2002, he worked for Penn Street Advisors Inc., the Penn Street Funds, The Vanguard Group, Rittenhouse Financial Services, and CoreStates Investment Advisors.

Doug holds the Chartered Financial Analyst designation and is a Chartered Market Technician. He is a member of the Financial Analysts of Philadelphia, the Philadelphia Securities Association and the National Association of Business Economists.

He earned his Bachelor of Science in finance from Penn State University and his Master of Science in finance from Drexel University.

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