Collateral: Biographical Insert for Wealth Management Team

mb wealth management

Spencer L. Klein

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Investment Group
MB Financial Bank
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Started at MB: 2010

Started my career: 1995

Hometown: St. Louis, Missouri

What are your areas of specialization?
I build and manage portfolios of stocks, bonds and mutual funds for affluent individuals and institutions. I also give group presentations on investing, write MB's monthly publication called *The Market Brief*, do original research on macroeconomics and investing, and cover the financial sector stocks for our proprietary large cap equity strategy.

What attracted you to MB's Wealth Management Group?
I am passionate about investment management and enjoy working with peers who feel the same way. I also cherish my clients' appreciation when they understand the value – and benefit from the returns - that result from MB's wealth management team's recommendations.

Which of your personal attributes helps clients most?
I make a point of really listening to my clients so I can help them enjoy more success at a level of risk comfortable for them. I'm also able to provide access to Wall Street-caliber analytics, enhanced by my personal knowledge of the Chicago market.

Chartered Financial Analyst® Designation

Member
CFA Chicago

Member
CFA Institute

Cub Scout Pack Treasurer
Boy Scouts of America®

MBA – Economics and Finance (Dean's List)
University of Chicago Booth School of Business

B.A. – Economics
University of Chicago

prosperity ■ personalized

Client: MB Financial Bank Wealth Management Team

Objective: To create official bios of 31 team members that would give prospects a sense of each financial advisors' history, professional expertise and approach to wealth management and client service.

Strategy: To have each team member answer questions in their own voice about these areas as well as their professional credentials, education and personal background.

Results: Team members loved being able to market themselves in their own words (with a little help from marketing!) These bios added a personal touch to their presentations that was appreciated by team members and prospects alike.