



## **CIBC U.S. Private Wealth Management Expands Investment and Client Service Teams**

**ATLANTA**, February 27, 2019 - **CIBC U.S. Private Wealth Management** announced today the expansion of its investment and client service teams with the addition of three experienced professionals.

"We are pleased to welcome Jeffrey, Lawrence and Bob to our firm," says Jack Markwalter, Chief Executive Officer, CIBC U.S. Private Wealth Management, "Jeffrey and Lawrence bring an abundance of expertise to our investment team, and Bob's experience, which spans over two decades, will aid in further deepening our client relationships. We look forward to their contributions, which will enhance the client experience."

**Jeffrey B. Lee, CFA, is named vice president and senior investment analyst in Boston**, focusing on hedge fund investments within the Multi-Manager Investment Program (MMIP). Prior to joining the firm, Lee served as an expert-in-residence at SOSV, a \$500 million venture capital firm, assisting portfolio companies with scaling their businesses. Previously, he spent more than 12 years at Spring Mountain Capital, a New York-based investment management firm, where he was most recently a vice president in the growth equity group, where he sourced, executed and advised investments in technology-enabled businesses and healthcare companies across North America. Prior to that time, Lee was a senior analyst in the fund-of-funds group, focusing on hedge fund and private equity fund investments. He received a bachelor's degree in economics from Cornell University and holds the Chartered Financial Analyst® designation. Lee is a member of the New York Society of Security Analysts and serves on the Advisory Council for Entrepreneurship at Cornell University.


**Lawrence Li is named senior vice president and senior investment analyst in Boston**, providing broad support for the firm's proprietary investment strategies team. Prior to joining the firm, he was a vice president at Sunley House Capital Management, where his primary area of focus was covering the technology, media and telecom sectors in the Americas. Previously, he was an associate at Charlesbank Capital Partners, where he participated in various board activities for portfolio companies and conducted market research and due diligence. Li received a bachelor's degree in industrial and systems engineering from the Georgia Institute of Technology.

**Robert "Bob" Gaudette, CTFA, is named vice president and client service manager in Atlanta** and joins the firm with more than 20 years of industry experience. In this role, he works closely with relationship managers to provide comprehensive client service and account administration for high net worth individuals, families and foundations. Prior to joining the firm, Gaudette was a trust advisor at SunTrust Private Wealth Management, where he was responsible for the administration of fiduciary client relationships and provided guidance on various estate planning, fiduciary and taxation matters. Previously, he was a trust officer with U.S. Trust, Bank of America Private Wealth Management. Gaudette received a bachelor's degree in economics from the University of Georgia, and a master's degree from the Keller Graduate School of Management. He also holds the Certified Trust and Financial Advisor (CTFA) certification.

## **About CIBC**

CIBC (NYSE: CM) (TSX: CM) is a leading North American financial institution with 10 million personal banking, business, public sector and institutional clients. CIBC offers a full range of advice, solutions and services in the United States, across Canada and around the world. In the U.S., CIBC Bank USA provides commercial banking, private and personal banking and small business banking solutions and CIBC Private Wealth Management offers investment management, wealth strategies and legacy planning. Visit us at [cibc.com/US](http://cibc.com/US).

## **Disclosure**

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