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Matthew Clemens, MBA, CFP® · 3rd

Senior Vice President - Financial Advisor at RBC Wealth Management

-  RBC Wealth Management
- State University of New York at Buffalo

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Experience



Senior Vice President - Financial Advisor

RBC Wealth Management · Full-time

Sep 2022 - Present · 1 yr 3 mos

Westlake, Ohio, United States

Financial Consultant, First Vice President - Investment Officer

Wells Fargo Advisors · Full-time

Oct 2005 - Sep 2022 · 17 yrs

226 Crocker Park Blvd, Suite 200 Westlake, OH 44145

Provide fixed income, equity, and alternative investment guidance, as well as a comprehensive investment plan customized for each of our rel. ...see more

Senior Equity Trader

Verus Investment Management

Jan 2003 - Dec 2004 · 2 yrs

Highland Hills, OH

General partner and senior equities trader for a \$300 million long/short equity hedge fund with a strategy for low correlation absolute return.

Equity Trader

Shaker Investments, LLC

Feb 1999 - Dec 2002 · 3 yrs 11 mos

Shaker Heights OH

General partner and senior equities trader for a \$2 billion multi-strategy investment company.

Education

State University of New York at Buffalo

Master of Business Administration (MBA), Corporate Finance and Financial Institution & Markets

1996 - 1998

Activities and societies: One of 8 participants in the 5 year accelerated M.B.A program. Excelled as a four year Varsity Letterman for University ...see more

State University of New York at Buffalo

Bachelor of Science in Business Management (B.S), Business Administration and Management, General

1994 - 1998

Licenses & certifications

Certified Financial Planner

CFP Board

Issued Dec 2020 · Expires Jul 2024

Credential ID 280962

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David Kelly · 3rd

Chief Global Strategist at J.P. Morgan Asset Management

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Ray Dalio

Founder, CIO Mentor, and Member of the Bridgewater Board

2,559,068 followers

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People you may know

From Matthew's company



Andjela Savovski

Private Banking Advisor at RBC Wealth Management

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Byron T. Adams

Operations Reconciliation and Control Specialist at RBC Wealth Management

+ Connect

Christopher Drew

Senior Vice President-Financial Advisor at RBC Wealth Management

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RBC Wealth Management Client Associate

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