

Chuck Roberts (Stifel)

Chuck Roberts - Managing Director of Investments at Stifel

A financial industry professional with more than 25 years of investment banking experience, Chuck Roberts joined Stifel as Managing Director/Investments in 2016. As a senior partner of Stifel's The CR Wealth Management Group, Chuck Roberts works with a team of advisors who offer each client a comprehensive wealth management experience using strategy and objectivity.

Roberts began his career in 1990 when he joined Lehman Brothers. In 2005, he joined Morgan Stanley as a Financial Advisor before coming to Stifel.

Outside of his professional activities, he spends his time traveling between the East Coast and Europe, playing tennis, kite surfing around the Caribbean and Latin America, and volunteering at his children's schools. During his summer trips to Europe, he visits Greece, Italy, and Spain. He also notes the Caribbean island of Saint Barthélemy as one of his favorite vacation spots. A passionate fan of the New York Knicks, he has held season tickets for more than 15 years.

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EXPERIENCE

Stifel Nicolaus

MAR 2016 - PRESENT

Managing Director/Investments

Morgan Stanley

MAR 2005 - MAR 2016

Managing Director, Financial Advisor

EDUCATION

Stony Brook University

SEP 1986 - DEC 1989

BS

George Washington University

CIMC