

Name: Aaron Wall, CFA

Position, Company: Partner, Portfolio Manager at Fidelis Capital

Originally from Columbia, Maryland, Aaron Wall has spent his career helping families and institutions by providing oversight on their investment portfolios. With his investment experience, Aaron works as part of the Investment Team where he helps clients construct investment portfolios that meet their long-term goals while optimizing their risk. Aaron has experience managing portfolios across all major asset classes and uses this expertise to research new ideas, implement current strategic thinking, and communicate with clients. After spending the beginning of his career at U.S. Trust (now Bank of America Private Bank), Aaron left his established role in 2023 to be a founding member of the Washington, D.C. office for Fidelis Capital. Aaron continues to spend his time advising on large investment portfolios while balancing his responsibilities as a Partner in the new venture. He is an active member of the Fidelis Capital Investment Committee where he publishes commentary, researches new investments, and assists with operational responsibilities for the firm.

Aaron graduated from Salisbury University in 2013 with a B.S. in Finance. Aaron is a CFA Charterholder and member of the Washington, D.C. CFA Society. He is currently completing his MBA at the University of Virginia's Darden School of Business.

Aaron resides with his wife in Washington D.C. As evidenced by his dog Oshie, Aaron is an avid D.C. sports fan and can be found supporting local teams across the city. He remains committed to learning to play golf and is an avid skier during the Winter months.