

## **James (Jamie) Cornehlson, CFA®**

Jamie serves as Managing Director, Capstone Investment Financial Group, a financial services firm specializing in helping clients plan, implement and manage their financial goals. Capstone provides fee-only independent investment management services whose investment process is explained in the book, “Conquering the Divide: How to Use Economic Indicators to Catch Stock Market Trends”, that Jamie Co-authored. Capstone has three offices: Colorado Springs, CO, New City, NY and Rochester, NY.

In 2012 Jamie launched AUM in a Box to help meet the growing needs of financial advisors and provide them with the tools and resources to succeed in their business. Realizing the advantages of an independent consultant to help us manage our growth, Meld Financial engaged Jamie’s consulting services in 2013. In 2016 he became a member of Meld’s Investment Committee.

Jamie is a Certified Financial Advisor™ Charter holder and past president of the CFA Society of Colorado. He has been the featured speaker at several national events including the California NAIFA and two CFA annual forecast dinners. His articles on planning and investments are featured on ABC news.

He received his MBA from the William E. Simon Graduate School of Business at the University of Rochester, his Bachelor of Arts in economics from the University of Colorado and studied econometrics at the University of York in England. Jamie is disciplined in both business and athletic competition, competing in triathlons and aquathlons. He lives in Rochester, NY with his wife Elizabeth and their foster son Jonathan.