



Jeff Sams, CFA[®]
Managing Director
Head of Portfolio Services

CONTACT

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BACKGROUND

Jeff Sams is a Managing Director and Head of the Portfolio Services department at Northland Securities. He leads a team responsible for Bond Analytics, Municipal Bond Credit Support, Asset Liability Management Reporting, Portfolio Accounting, and RIA Performance Reporting for firm clients. He has over 15 years of experience in the financial services industry.

EDUCATION

Jeff has earned the Chartered Financial Analyst[®] (CFA[®]) designation, has a degree in finance from the Carlson School of Management at the University of Minnesota, and has attended the Financial Manager's School at the Graduate School of Banking in Madison, Wisconsin.

PROFESSIONAL LICENSES/DESIGNATIONS

Jeff holds and maintains the FINRA Series 7 General Securities Representative, Series 24 General Securities Principal, Series 53 Municipal Securities Principal, Series 66 Uniform Combined State Law, and Series 63 Uniform Securities State Law Exam registrations, and is a Chartered Financial Analyst[®] (CFA[®]) Charterholder.

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