



**Casey Poole, MBA**  
**Managing Director**  
**Fixed Income**  
**Institutional Sales**

CONTACT

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BACKGROUND

Casey has been assisting institutional clients with the management of their bond portfolios for more than two decades, beginning his career at Bankers' Bank - Madison in 2000. Client relationship development has always been his primary focus while leaning on his expertise across multiple fixed-income product sectors and portfolio management.

Away from the office, Casey spends time with his wife Jennifer and two young boys in Madison, WI, and is actively involved with their hockey and baseball. He also occasionally gets out West to summit mountains in the Cascade Mountain Range.

EDUCATION

Casey has his MBA and BA degrees in Finance from Edgewood College - Madison. He has completed the Graduate School of Investments from the Darla Moore School of Business - University of South Carolina.

PROFESSIONAL LICENSES/DESIGNATIONS

Casey currently holds and maintains the FINRA Series 7 General Securities Representative, Series 63 Uniform Securities State Law Examination, Series 52 Municipal Securities Representative, and Series 53 Municipal Securities Principal registrations.

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