

## SPEAKER BIO



**BEN GOETSCH, CFA**

***Senior Investment Strategist***

Bernstein Private Wealth Management

[benjamin.goetsch@bernstein.com](mailto:benjamin.goetsch@bernstein.com)

(212) 969-1557 (o)

Ben is a Senior Investment Strategist in the New York office of Bernstein Private Wealth Management. He is a member of Bernstein's Private Client Investment Policy Group, which provides asset allocation, investment and risk management advice for high-net-worth clients, endowments, and foundations. Prior to joining the firm, Ben was a senior investment strategist at City National Bank, the U.S. private bank of RBC, where he was responsible for supporting firm-wide asset allocation decisions, generating, and communicating investment research and thought leadership, and selecting alternative investments for the firm's high net worth clients. Earlier, Ben was a senior investment strategist in Northern Trust Asset Management's quantitative strategies group, where he provided research and thought leadership and worked with large, sophisticated institutional investors and high-net-worth individuals and families across the globe to develop and implement a variety of investment strategies. Ben earned his BA in Economics and German Language from Washington and Lee University. He holds the Chartered Financial Analyst designation and is a member of the CFA Society New York.

## Biography

---

### Kelly A. Clements

*Client Advisor • 212.969.2240 • [kelly.clements@Bernstein.com](mailto:kelly.clements@Bernstein.com)*



Kelly Clements is an Assistant Vice President and Client Advisor at Bernstein. She advises individuals and their families as well as institutions regarding a wide range of financial planning and investment matters, with a focus on tailoring comprehensive strategies uniquely suited to each client's individual resources, tax situation, risk tolerance and estate planning goals. She joined the firm in 2018. Prior to Bernstein, Kelly worked in risk consulting for KPMG's State & Local Government practice. She has a BS degree in Financial Economics & Spanish from Binghamton University and also spent time studying at Universidad Europea de Madrid.