

HARRIS myCFO®

In his role as Senior Portfolio Manager, Joseph Knecht specializes in developing specifically tailored asset management programs for large and complex trust and investment relationships. He serves on the Personal Trust Investment Committee, the Alternative Investments Committee and the Benefits Investment Committee. He joined Harris myCFO in 1991.

Joseph became a CERTIFIED FINANCIAL PLANNER™ practitioner in 2007 and earned the Chartered Financial Analyst® designation in 2001. He is active in the CFA Society of Chicago and was elected Chairman of the Society in June 2008. He received his Bachelor of Arts from Harvard University, with a concentration in Physics. He was awarded an MBA with high honors by the University of Chicago Booth School of Business, where he concentrated in Finance and Marketing.

Joseph and his wife live in Chicago, IL.



JOSEPH R. KNECHT,
CFA, CFP®

Senior Portfolio Manager,
BMO Harris Bank, N.A.

Tel: 312.461.5615
joseph.knecht@harrismycfo.com

Harris myCFO
111 West Monroe Street, Suite 10E
Chicago, IL 60603

Harris myCFO® | A Knowledge of Wealth™

Integrated wealth management with independent investment advisory services and the comprehensive capabilities of a multi-family office.

- INVESTMENT ADVISORY
- ESTATE AND TRUST ADVISORY
- TAX PLANNING
- PHILANTHROPIC PLANNING
- FAMILY EDUCATION
- CAPITAL ADVISORY SERVICES AND CUSTOM BANKING
- RISK MANAGEMENT AND INSURANCE ADVISORY
- FINANCIAL REPORTING AND EXPENSE MANAGEMENT

