



Wealth Management Research

Jonathan Woloshin, CFA®

Deputy Head of Corporate Research

Responsibilities

In addition to his work as a Generalist, Jonathan covers REITs and homebuilders.

Education

Jonathan holds a B.A. in Psychology from the University of Rochester and an M.B.A. in Finance and Corporate Accounting from the William E. Simon Graduate School of Business at the University of Rochester.

Professional history

Jonathan has 24 years of experience as a securities analyst covering sectors including REITs, homebuilders, healthcare, technology, industrial, consumer staples, and energy. His experience extends beyond traditional equity analysis to include analysis of fixed income, convertibles, options & derivatives. In addition, experienced in capital structure arbitrage and short selling.

Professional affiliation

Jonathan is a Chartered Financial Analyst® Charterholder, holds NASD series 7, 24, 66, 86, and 87 licenses, and is a member of both The CFA Institute and The NY Society of Security Analysts.