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## Annelise Li, CFA

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Annelise Li, CFA, is the founder and CEO of Fintent Invest, Inc. A seasoned investment advisor and private investor, Annelise has advised private wealth clients, non-profit organizations, and institutional clients on portfolio management, structured financial products, equity, and fixed income investments. She also has over 20 years of experience investing in real estate and private assets as an individual and in partnerships, totaling invested project value of over \$200 million.

Annelise began her career as a research assistant at the Federal Reserve Board of Governors (Washington, DC) and has worked as a research associate, portfolio analyst, marketing analyst, and portfolio manager at Watson Wyatt, Bank of America, AOL Time Warner, and Citizens Business Bank.

She earned her bachelor's degree (Magnum cum Laude) in economics from Washington University in St. Louis and a Master of Science degree in finance from Illinois Institute of Technology.

She holds the Chartered Financial Analyst (CFA) designation and is a member of the CFA Society of Los Angeles.

As an active member in her community, she's volunteered with Head Start programs, Habitat for Humanity, and local tutoring programs for underserved students. Annelise has held executive positions in Parent Teacher Association (PTA), Parent Board, and is a current director of the La Canada Flintridge Educational Foundation, and a member of the Parcel Tax Oversight Committee with the La Canada Unified School District.

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