

Jeff Terrell, CFA

Senior Vice President, Senior Analyst – Investment Strategy, Portfolio & Market Strategy



As Truist Advisory Services, Inc.'s senior analyst in investment strategy, Jeff is an integral member of the Investment Advisory team responsible for establishing Truist's investment strategy and outlook. In this role, he contributes to the group's investment strategy, portfolio construction process, written client commentary and public speaking engagements, while providing private client support across the Truist market footprint.

Experience

Jeff has more than 30 years of investment experience, joining Truist predecessor BB&T in 2016 after serving for 20 years as a chief investment officer for state and nationally chartered community banks in the southeast. Jeff has testified as an expert witness in investment litigation matters focusing on trust management, fiduciary investing practices, and investor suitability.

Areas of focus

- Market & investment strategy
- Portfolio construction process
- Trust management

Industry associations

- Member of the CFA Institute
- Member of CFA society of North Carolina
- Member of the CFA society of Virginia

Education & designations

- Chartered Financial Analyst (CFA) designation since 1996
- Bachelor's degree in finance, Western Michigan University

Personal

Jeff and his wife Elizabeth have four sons and live at Lake Norman in Denver, North Carolina.



Investment and insurance products:

Are not FDIC or any other government agency insured | are not bank guaranteed | may lose value

Jeff Terrell is an investment adviser representative of Truist Advisory Services, Inc.

Wealth

Disclosures

Advisory managed account programs entail risks, including possible loss of principal and may not be suitable for all investors. Please speak to your advisor to request a firm brochure which includes program details, including risks, fees and expenses.

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