

# JFS Wealth Advisors names new Chief Investment Officer

*Wealth management firm announces new leadership promotion*

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[/EINPresswire.com/](#) -- [JFS Wealth Advisors](#), a full-service wealth

management firm with locations across the country, announced today that effective July 1, 2022, Manish Upadhyay CAIA<sup>®</sup>, CIMA<sup>®</sup>, will be named [Chief Investment Officer](#) to succeed Stephen Lee.



Currently, the Director of Investment Management, Manish joined JFS in 2015 through the merger of CIS, where he was the firm's Investment Manager. With over 20 years of experience in the financial services industry, Manish has previously served as an Investment Analyst and

Private Equity Fund Administrator. He earned a Bachelor's degree in Economics from the University of Maryland, Baltimore County in 2000. After completing the CIMA<sup>®</sup> program at the University of Pennsylvania's Wharton School of Finance, he received the Certified Investment Management Analyst<sup>®</sup> designation. In 2015 he earned the CAIA Charter designation.

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*Robert Jazwinski, President and Managing Partner, JFS Wealth Advisors*

“This step is a well-deserved recognition of the excellent work and demonstrable skill set that Manish brings to his daily efforts at JFS,” said Robert Jazwinski, CPA/PFS, CFP<sup>®</sup>,

President and Managing Partner of JFS Wealth Advisors, “and we congratulate Manish on this exciting next chapter in his career. We expect a seamless transition, as this move has been planned for some time.”

In taking on the role of CIO, Manish Upadhyay will continue much of the work he already undertakes but will also now lead the JFS Investment Committee and investment strategy

execution in addition to providing oversight of the portfolio management and trading team. Current CIO, Stephen Lee will work in a transition role, as he gradually reduces his workload, focusing his efforts on several investment and communication-related projects, as well as working with JFS clients.

## About JFS Wealth Advisors

JFS Wealth Advisors, a full-service firm with 9 locations, is dedicated to helping financially successful [individuals and families](#) live their dreams by providing integrated financial planning and investment strategies for every stage of life. Honesty and integrity are at the core of their professional philosophy, and they believe in taking the time to get to know their client's goals, challenges, and vision for the future.

Gretchen Halpin

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