

June 5, 2023

Shaker Investments Announces Promotion of Brad Wheeler to Role of President

Shaker Investments is pleased to announce the promotion of Brad Wheeler to President. Brad, who joined the Shaker Investments team in November 2018, previously served as Vice President and Head of Business Development and Client Services.

As President, Brad will honor and respect Shaker's original mission statement and investment mandate, while implementing new technology, marketing, and business solutions. With over 24 years of experience in the financial services industry, Brad is well equipped to take on the challenge of leveling up Shaker Investments all while staying true to the original core values of the firm and maintaining its high level of excellence.

As stated by Brad, "I am extremely excited to step into the role of President. Edward has been a mentor to me, and I am profoundly grateful for this opportunity to shepherd the Shaker Investments vision into a new chapter of growth while continuing to build on its meaningful legacy within the financial services industry."

Shaker Investment Founder Edward Hemmelgarn expresses, "I am confident that Brad and this next generation of leadership will elevate Shaker's position as a pioneer in the small and mid-cap investment management space."

Shaker Investments was established over 30 years ago with a very clear mission statement and investment strategy – to deliver superior returns and first-class service to all clients. Their investment strategy is and will always be focused on portfolios consisting of primarily small and mid-cap companies whose attributes favor exceptional, long-term investment performance.

