

# Colin H. Connolly

## Planned Giving Investment Specialist



**Colin is a planned giving investment specialist for PNC Institutional Asset Management®. He coordinates the delivery of investment solutions for Planned Giving client portfolios. His key responsibilities include: maintaining strong relationships with clients by providing thought leadership, education and insights; managing portfolios in accordance with the client's investment objectives and applicable state annuity regulations; providing recommendations to allocations based upon the client's needs; and supporting the development of new business relationships. His area of focus is investment programs designed for charitable gift annuities, charitable remainder trusts, and pooled income funds.**

### **Firm Start**

June 2008

### **Industry Start**

June 1996

Prior to assuming his current position, Colin was an investment advisor and group manager with the firm's Institutional Asset Management Client Services Investment Group. Previously he served as an investment associate with UBS Wealth Management and with the Merrill Lynch Private Client Group.

Colin graduated with a Bachelor of Business Administration in finance from Loyola University, Maryland and a Master of Business Administration in accounting/taxation and finance from Fordham University. He previously served as a board member for a national non-profit organization. He is currently a member of the National Association of Charitable Gift Planners and a board member for the Pittsburgh Planned Giving Council.

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**Investments: Not FDIC Insured. No Bank Guarantee. May Lose Value.**