



**Capital Advisors Builds its Research Team
Introducing Steven V. Soranno, CFA, CAIA
Director of Equity Research**

Capital Advisors is thrilled to announce that Mr. Steven V. Soranno will join the firm on May 1st to serve as the Director of Equity Research. Steve will be relocating to Tulsa from Detroit with his wife Anna, 12-year old daughter, Victoria, and 10-year old son, William.

Steve brings more than 25 years of financial industry experience to the research team at Capital Advisors. Prior to joining Capital Advisors, Steve served as the Director of Equity Research at **Ameriprise Financial Services (AMP: ~\$130)**, a publicly traded investment firm with more than \$800 billion in assets under management.¹ Steve led the equity research team at **Ameriprise**, including oversight of the equity focus list, model portfolios and investment thought-leadership initiatives. Steve was also a member of the Ameriprise Global Asset Allocation and Structured Products Committees.

Prior to **Ameriprise**, Steve was a Senior Analyst at **Calvert Investment Management** in Washington, DC. **Calvert** is a leader in responsible investing with more than \$10 billion in assets under management during Steve's time there. At **Calvert**, Steve led the analyst team on various fund strategies, and he designed the firm's process for incorporating environmental, social and governance (ESG) information with equity valuation models and investment themes.

Previously, with **Credit Suisse AG's** global private bank, Steve served as deputy head of Americas Equity Research covering the Technology, Media and Telecommunications sectors. He also coordinated global and cross-sector research products, oversaw the New York team's investment process, and managed the group's talent development program.

Prior experiences include serving as the lead sell-side growth stock analyst with **CIBC Oppenheimer**, and an equity portfolio strategist at **Lehman Brothers**.

In addition to Steve's extensive professional experience, he is currently an adjunct professor at the **Kogod Business School at American University** in Washington, DC, where he teaches an online graduate-level course in accounting and finance.

Steve earned a B.A. from **Colgate University** in 1989 with a double major in Economics and Political Science. He earned his MBA from the **Darden Graduate School of Business Administration at the University of Virginia** in 1995. Steve is a Chartered Financial Analyst charter holder (CFA), and he has earned the Chartered Alternative Investment Analyst certification (CAIA).

Please see back page for disclosures

¹ Source: Company website - <http://ir.ameriprise.com/ir-home>

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