Richard A. Ferri, CFA®
Founder and CEO

Rick is founder and CEO of Troy, MI based Portfolio Solutions, LLC. He responsible for all research and marketing and is a member of the firm's Investment Committee. Founded in 1999, Portfolio Solutions is a low fee, SEC registered investment advisory firm serving individuals and small institutions across the country. Rick founded Portfolio Solutions because he was dissatisfied with the brokerage model of high-cost, product-centered client service.

Rick has over 20 years experience in the investment industry working at major Wall Street firms. Earlier in his career, he was a portfolio manager at Smith Barney and an investment management consultant at Kidder Peabody

A seasoned media source, Rick is frequently quoted in *The New York Times*, *Wall Street Journal, Barron's, Kiplinger's Personal Finance, Money* and has appeared on CNBC, Fox News and Bloomberg.

Rick is a graduate of the University of Rhode Island with a BS in business and Walsh College with a MS in finance. He is also a Chartered Financial Analyst (CFA). Rick has published five books and many articles on the subject of low-cost investing using index funds and ETFs. Prior to entering the financial industry in 1988, Rick was an officer in the Marine Corps where he flew fighter aircraft. He retired from the Reserves in 2001.

In his free time, Rick enjoys horseback riding, scuba diving, and searching for arrowheads. He also serves as a director and the fundraising chairman of his local volunteer fire department.

Areas of Expertise
- Investment Management
- Financial Planning
- Risk Management
- Asset Allocation

Education/Certification
- MS., Finance, Walsh College
- BS, Business, The University of Rhode Island
- Chartered Financial Analyst

Featured in Publications
- *The New York Times*
- *Wall Street Journal*
- *Barron's*
- *Money*
- *Kiplinger's Personal Finance*
- *Financial Planning Journal*
- *Journal of Indexes*

Author of Five Books
- *All About Index Funds* (McGraw Hill)
- *All About Asset Allocation* (McGraw Hill)
- *The ETF Book: All You Need to Know About Exchange Traded Funds* (Wiley)
- *Protecting Your Wealth in Good Times and Bad* (McGraw Hill)
- *Serious Money, Straight Talk about Investing for Retirement* (Portfolio Solutions Press)

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LOW-COST INVESTMENT MANAGEMENT