

Punch

A BOUTIQUE INVESTMENT ADVISORY



Sam Sheldon

Research Analyst

Sam Sheldon joined Punch & Associates as an intern in June 2016, while attending the University of St. Thomas. After graduating in May 2018 with a B.A. in Financial Management, he joined the team full-time as an investment research analyst.

During his time at St. Thomas, Sam led the University's Investment Club and is now studying for the CFA exams. Sam completed Level One of the CFA® Program in early 2023, and he is currently studying for Level Two of the Chartered Financial Analyst® designation. In his free time, Sam enjoys boating on White Bear Lake, cheering for the Green Bay Packers, and playing an occasional round of golf.

CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute.

Years at Punch:

8

Years in the Industry:

8

Contact:

ssheldon@punchinvest.com

Punch & Associates Investment Management, Inc.

7701 France Avenue South, Suite 300 | Edina, MN 55435

Phone: 952.224.4350 | Web: punchinvest.com