

Punch

A BOUTIQUE INVESTMENT ADVISORY



Sam Sheldon, CFA

Senior Research Analyst

Sam Sheldon joined Punch & Associates in 2016 and serves as an investment research analyst. He focuses on discovering and analyzing small and microcap companies, with a passion for understanding the story behind the business. In addition to his research responsibilities, Sam oversees the firm's internship program.

Sam earned his BA in Financial Management from the University of St. Thomas, where he served as President of the Investment Club, and he is a CFA® charterholder.

Outside of work, Sam enjoys spending time on White Bear Lake, restoring his 1958 boat, cheering on the Green Bay Packers, and getting out for the occasional round of golf. He lives in Lake Elmo with his wife, Taylor.

Years at Punch:

9

Years in the Industry:

9

Firm Activities:

- *Compliance Committee*

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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