Investing made better by our team of experts

Investment Committee

Our Investment Committee brings decades of industry expertise in driving our investment approach, portfolio construction, and allocation advice. The committee ensures our investments are best in class, combining substantiated research with the most effective investing tools available today.

- **Jon Stein, CFA**

  ### CEO and Strategic Allocation

  Jon started Betterment after years of consulting for Wall Street's biggest financial institutions. He studied economics at Harvard University and finance at Columbia Business School. He is a CFA® charterholder.

- **Alex Benke, CFP®**

  ### Holistic Financial Planning

  Prior to joining Betterment, Alex worked at JPMorgan for 10 years in Credit Markets and Risk Technology. He is a CERTIFIED FINANCIAL PLANNER™ professional with a degree in Operations Research Engineering from Cornell University.

- **Dan Egan, MSc**

  Quantitative and Behavioral Finance

  Dan was the Behavioral Finance Specialist at Barclays Americas and helped found the London team in 2007. He earned his Master of Science in Decision Science from the London School of Economics.

- **Geert Bekaert, PhD**

  Professor of Finance and Economics. Columbia University

  Geert brings a worldly view to Betterment, assists with our capital markets and returns assumptions as well as the mathematical nuances of portfolio optimization.

- **Saman Majd, PhD**

  Former Vice Chairman, Deutsche Asset Management

  With a background in global bond markets, Saman's perspective on our fixed income exposures is invaluable.

- **Bruce Greenwald, PhD**

  Professor of Finance, Columbia University

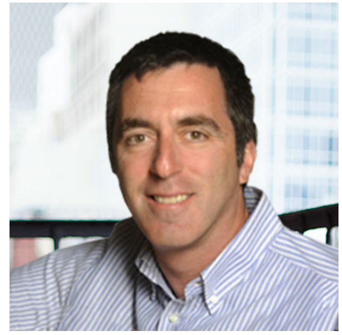
  Bruce is one of the worlds strongest advocates of value investing, and assists Betterment with its asset allocation models.

- **Mark Zurack, MBA**

  Professor of Finance, Columbia University

  Mark brings deep experience in equity trading to Betterment from his days at Goldman Sachs, advising on the nuance of tax and execution risks in capital markets.

- **Rob Stavis**

  Partner, Bessemer Venture Partners

  With a background managing and trading fixed-income securities Rob assists with ensuring the risk management in our bond basket is both ideal and practical.

Investment Team

Our Investment Team delivers investment innovations both large and small. Their focus includes securities selection, cost minimization, tax optimization, risk management, and finely tuning our algorithms (using tools such as Monte Carlo simulators).

- **Dan Egan, MSc**

  Quantitative and Behavioral Finance

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- **Alex Benke, CFP®**

  Holistic Financial Planning

  Prior to joining Betterment, Alex worked at JPMorgan for 10 years in Credit Markets and Risk Technology. He is a Certified Financial Planner with a degree in Operations Research Engineering from Cornell University.

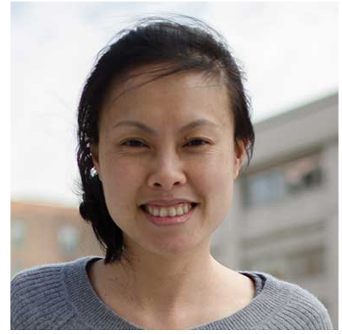
- **Rukun Vaidya**

  Capital Markets and Trade Execution

  Rukun joins Betterment after five years performing risk research at Highbridge Capital, where he focused on statistical arbitrage, quantitative macro, and quantitative commodities. He has a degree in Operations Research from Cornell University.

- **Lisa Huang, PhD**

  Quantitative Portfolio Management

  Lisa holds a degree in Mathematics and Biochemistry from UCLA and a PhD in Physics from Harvard University. She was previously a quantitative strategist at Goldman Sachs, leading research collaborations and building models for fixed income strategies.

- **Boris Khentov, JD**

  Tax and Securities Law

  Boris is a tax and capital markets attorney, with a law degree from Northwestern. He has a BA in Computer Science from Harvard University, bringing a unique mix of engineering skills and legal and regulatory experience to Betterment.

- **Ellie Lan**

  Investment Analyst

  Ellie's resume includes equity research at Bank of America and trading Chinese ADRs at Morgan Stanley. She studied economics and political science at Columbia University.

Support Specialists

Our dedicated support specialists are available 7 days a week. They are here to walk you through every part of the investment process, including completing an IRA or 401(k) rollover seamlessly.

Put our team of experts to work for you.