

Contact

Charleston, South Carolina
pmeeks@harvestportfoliomanagement.com

www.linkedin.com/in/paulmeeks

(LinkedIn)

go.citadel.edu/business/

(Company)

www.harvestportfoliomanagement.com

(Company)

paulmeeksinvestments.com/

(Personal)

Top Skills

Wealth Management

Portfolio Management

Equity Analysis

Languages

English (Native or Bilingual)

Certifications

Licensed Historic Charleston Tour Guide

Chartered Financial Analyst (CFA)

CAIA Charterholder

Paul Meeks, CFA, CAIA

Finance Professor; CIO; Tech Investor; Partner, Wall Street Beats
Charleston, South Carolina, United States

Summary

I am a 30-year public and alternative assets investment analyst, portfolio manager, research director, or chief investment officer who has been the "face" of almost every organization I have served. This includes in print and on-air business media all over the world. My economic sector investment specialties are technology and communication services.

I am an academic. I have been an adjunct finance or accounting professor at three universities since 2005. Currently, I am the Professor of Practice in the Accounting and Finance Department in the Baker School of Business at The Citadel.

Email: pmeeks81@gmail.com.

See <https://paulmeeksinvestments.com/>.

Experience

The Citadel

Professor of Practice, Baker School of Business

May 2020 - Present (4 years 3 months)

Charleston, South Carolina

Teach corporate finance, investments, and financial accounting. Advise Student Managed Investment Fund which manages over \$1 million for Citadel Foundation. Lead financial careers recruiting within Baker School.

Adjunct or full-time faculty at three universities since 2005.

Email: meeksp1@citadel.edu.

See <https://go.citadel.edu/business/>.

See <https://go.citadel.edu/business/student-managed-investment-fund/>.

Harvest Portfolio Management
CIO and Portfolio Manager
July 1987 - Present (37 years 1 month)
Charleston, South Carolina

Manage HNW and institutional portfolios through Harvest Portfolio Management where I am CIO. Experienced investing in all asset classes. Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA).

Email: pmeeks@harvestportfoliomanagement.com.

See <https://www.harvestportfoliomanagement.com/>.

Harvest Portfolio Management
Tech Analyst and Portfolio Manager
July 1992 - Present (32 years 1 month)
Charleston, South Carolina, United States

Focus on public and private equity analysis and management of tech portfolios. Offer Meeks Tech Portfolio to investors through Harvest Portfolio Management. Started and managed over \$7 billion total in six technology mutual funds for Merrill Lynch Investment Managers (acquired by BlackRock in 2006). Frequently on CNBC and other business networks around the world "talking tech."

Email: pmeeks@harvestportfoliomanagement.com.

See <https://www.harvestportfoliomanagement.com/>.

CNBC and Other Business News Outlets Globally
Meeks in the Media
January 1995 - Present (29 years 7 months)
Charleston, South Carolina

On air and in print mostly "talking tech." Have contributed to CNBC weekly since 1995. Appear on other networks globally including Yahoo! Finance, CNBC Asia, Bloomberg Asharq, Fox Business News, Bloomberg, and Benzinga. Write institutional equity research for subscription service Pro-to-Pro (an On the Street Pro company), a business column for a newspaper, and freelance copy on almost any topic in finance, financial accounting, or investments (public securities and alternatives). TED Talker. Paid speaker.

Benzinga

Host, "Tech Tune-Up with Paul Meeks"

January 2024 - Present (7 months)

Detroit, Michigan

Appear on my own show on Benzinga's YouTube channel.

See <https://youtube.com/live/7tMoDwl5j8o?feature=share> .

On the Street Pro, LLC

Contributor, Moderator, and Partner, "Wall Street Beats"

January 2024 - Present (7 months)

Tiburon, California

Officially, "the purpose of our company is to provide educational investment research content services on a subscription basis to institutional and mass market customers through our company's website." Each weekday, a 30-minute production of "Wall Street Beats" airs featuring investment experts. I cover tech.

See <https://wallstreetbeats.com/dashboard> .

Education

Northwestern University - Kellogg School of Management

MM (MBA), Finance and Accounting/Information Systems · (September 1990 - June 1992)

Williams College

Bachelor of Arts (BA), History and Political Science · (September 1981 - June 1985)

Northfield Mount Hermon

Summa Cum Laude · (September 1977 - June 1981)