

Chip Kalousek, CFA

Director of Portfolio Management

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"Good strategies typically fail for one reason, poor execution. My focus at Bridgeworth is to seamlessly execute clients' strategies to help ensure they achieve the best investment outcome for their personalized portfolio strategy, goals, and objectives."

Chip's background is in fiduciary asset management, with expertise in credit and equity research, risk-based portfolio construction, trading, investment policymaking, and investment-manager due diligence. After graduating from the University of Alabama at Birmingham with a BS in Finance in 2014, he joined First Horizon Bank (previously IBERIA Wealth Advisors). During his seven years there, Chip advanced to Senior Portfolio Strategist, overseeing the administration and investment management of over \$1 billion in portfolio assets.

As Director of Portfolio Management, Chip is a vital member of the investment team, monitoring and trading portfolios to ensure accounts are properly allocated. He also works closely with clients to develop a personalized investment strategy that meets their investment goals and constraints. By constructing an individualized portfolio and rebalancing when it matters most, he helps keep clients on track to execute their plans. Chip brings immense value to Bridgeworth clients, supports our investment committee, is a Chartered Financial Analyst® (CFA®), and is a member of CFA Society Alabama.

Outside the office, Chip is an active community member, teaching financial literacy in elementary schools and serving as a member of the Junior Achievement of Alabama Junior Board. He and his wife, Michelle, have one daughter, Josephine, and enjoy travel, live music, and outdoor activities.



AFFILIATIONS

- Junior Achievement Junior Board: Chair, 2023 - Present; Member, September 2018 – Current

EDUCATION

- University of Alabama at Birmingham (UAB), December 2014, Bachelor of Science, Finance, Concentration: Investment and Institutions
- CFA Institute, October 2023, CFA® Charterholder