



As Director of Client Services and COO (Chief Operating Officer), Sharmi is responsible for insuring all clients receive timely, competent assistance whenever needed. She oversees the coordination with every client's custodian, other professional advisors and accountants and sees that client confidentiality is strictly observed.

Since joining our company in 2012, Sharmi has become indispensable to CFI in her role of establishing and maintaining good client relationships, the smooth coordination of all client transactions and the resolution of any problems. Her work is vital to insuring that not only are new accounts with existing portfolios brought on board accurately, but also in providing ongoing quality client services that aligns with the "client first" culture of CFI.

Sharmi has an extensive background in all aspects of fixed income securities. She began her career 20 years ago at PIMCO and further honed her fixed income skills at Hotchkis and Wiley, a client servicing boutique investment firm acquired by Merrill Lynch Investment Management in 2003. Subsequently she worked as a Senior Performance Analyst for BNY Mellon and as an Account Relationship Manager for Financial Information Network (FIN), where she made significant contributions assisting clients with their accounting, performance and tax reporting needs.

Born in Calcutta, India, Sharmi holds a Bachelor of Science in Accounting, a Masters in Geography, and an MBA in Global Management.