



James B. Hagerty, CFA

Wealth Advisor, Principal



James B. Hagerty, CFA, is a Wealth Advisor, a Product Manager for the Bartlett Equity strategies, and a Principal at Bartlett Wealth Management. He provides investment advisory services to high net worth individuals and their families, foundations, endowments and nonprofit institutions. Jim is a Chartered Financial Analyst.

Jim received a Bachelor of Science in Economics from the University of Dayton. He serves on the advisory board of the Catholic Inner City Schools Educational Fund (CISE) and the Board of Trustees of St. Margaret Hall. He has served as an Adjunct Professor in the Finance Department at Xavier University, teaching investment analysis courses in the MBA program.

Jim joined Bartlett Wealth Management in 1994 and has 29 years of investment experience.

Areas of Expertise

Investment analysis

Equity investing

Portfolio management

Interview and Media Experience

[Opinion: Market volatility here until crisis contained](#), Cincinnati Enquirer

[Why Kroger's return on capital fell](#), Cincinnati Business Courier

[P&G makes its M&A move](#), Cincinnati Business Courier

[New York firm becomes second-largest owner of Macy's stock](#), Cincinnati Business Courier

[Cintas gives shareholders a big reward](#), Cincinnati Business Courier