



JEFF APPLGATE



Chief Investment Officer Citi Global Wealth Management

Jeff Applegate is chief investment officer for Citi Global Wealth Management, responsible for delivering competitive investment advice to clients. He leads the investment strategy team in performance and returns on client portfolios and partners with the investment strategy committee on the asset allocation process.

Prior to joining GWM, Applegate was the chief investment officer at Franklin Templeton for the global equity, fixed income, real estate and alternative investments teams. Previously, he was chief investment strategist for Lehman Brothers and Credit Suisse First Boston. Prior to this, Applegate held positions as a senior investment advisor on both the sell side and the buy side at institutions such as Shearson Lehman Hutton, E.F. Hutton and Smith Barney. He began his career as an analyst with H.C. Wainright in 1974.

Jeff earned a bachelor of arts in international studies from American University and a bachelor of literature in politics from New College of Oxford University. He is a member of the New York Society of Security Analysts and the CFA Institute.