

Miguel Rundstrom-Holguin

SENIOR INVESTMENT ANALYST

Services

Investment Management

Credentials

FINRA Series 65

Education

University of Oklahoma,
BA-Economics, 2022

Overview

Miguel supports the QuadCap investment team by ensuring the timely execution of trade requests, analyzing client portfolios, providing input to the firm's portfolio construction process, and preparing proposals for advisor-client meetings.

As an Investment Analyst, he is an avid believer in diversification, factor tilting, and strategically locating assets for the best possible after-tax returns.

Prior to joining QuadCap in 2024, Miguel worked at Excencial Wealth Advisors, where he tracked and reported on strategy performance and helped identify and propose client investment recommendations.

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