

Robert I. Helliesen

CFA
Principal



CURRENT RESPONSIBILITY

Bob is a principal with the San Francisco office of Milliman.

EXPERIENCE

Bob began his career in 1969 as a security analyst with Mutual Benefit Life in Newark, N.J.. He joined Crocker Bank, San Francisco in 1971 as a security analyst and moved to Crocker Investment Management Co. when that firm was founded. In 1978, he became manager for both portfolio theory applications and security research computer development.

In 1983, Bob joined a large U.S. institutional investment consulting firm as vice president and manager of consulting support, where he was responsible for asset allocation analysis and analysis of investment managers' investment processes.

Bob joined Doug Dorn in 1984 to form Dorn & Helliesen, which became Dorn, Helliesen & Cottle in 1993. As an owner and senior consultant at the firm, he has continued his consulting responsibilities in the San Francisco office of Milliman since January 2002.

Bob is a frequent speaker at industry conferences.

PROFESSIONAL DESIGNATIONS

- Chartered Financial Analyst

AFFILIATIONS

- Two-term board member of Pacific School of Religion, as chair of the Finance Cluster
- Member, San Francisco Society of Security Analysts
- Member, Association for Investment Management and Research
- Member, Western Pension Conference
- Programs and Affiliates committee of the State Association of Retirement Systems ("SACRS"—California)

EDUCATION

- BA, Economics, Colgate University
- MBA, Golden Gate University

