

# KEVIN R. MONHEIM, CFA

## SENIOR WEALTH ADVISOR

Kevin is responsible for providing financial solutions to high net worth individuals, businesses and employee benefit plans. A Chartered Financial Analyst (CFA), he joined Dopkins in 2026 after gaining experience in high-impact roles in private banking, corporate development, and institutional investment management.

Kevin brings a strong track record across private banking and institutional investment research, shaped by roles at a major private bank and a leading asset-management firm. In private banking, he advised high-net-worth clients on asset allocation, fixed-income strategies, and holistic wealth planning. Earlier, he spent six years in progressively senior investment-research roles, covering healthcare, consumer discretionary, and staples sectors. There, he developed deep expertise in bottom-up equity analysis, financial modeling, and valuation techniques such as Discounted Cash Flow (DCF), Sum-of-the-Parts (SOTP), Leveraged Buyout (LBO), and relative multiples—experience that strengthened his analytical judgment and sector insight.

While pursuing his degree, Kevin served as a Student Fund Manager and Financial Analyst for the Golden Griffin Fund LLC, a student-run investment fund managing approximately \$400,000 in real assets. Kevin created monthly portfolio monitor reports and economic indicator reports, as well as an in-depth investment thesis, analyst report, and valuation model to present to an investment committee. The report included market and industry analysis, valuation models (DCF, Relative Valuation, DDM), financial statement breakdown, and a finalized price target and recommendation.

Kevin achieved the rank of Eagle Scout for Boy Scouts of America, now known as Scouting America. Eagle Scout is the highest rank attainable in the Scouting America program. Since its inception in 1911, only four percent of Scouts have earned this rank after a lengthy review process.

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### CONTACT

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### EDUCATION

- B.S., Economics and Finance,  
Canisius University