



Jim Lumberg

Mr. Lumberg is responsible for Envestnet's impact investing initiatives.

Prior to joining Envestnet, Lumberg was Vice President and Director, Fixed Income Funds for the John Nuveen Company since 1990, where he worked extensively with financial advisors in developing and implementing service and support programs that responded to the evolving demands of financial intermediaries. Prior to this position, Lumberg was a portfolio manager responsible for the day-to-day management of five fixed income mutual funds with assets totaling over \$1.5 billion. As a portfolio manager, Lumberg consistently achieved top decile investment returns and was twice recognized by Lipper Analytical Services as the top-performing manager in his peer group.

In 1987, Lumberg earned his undergraduate degree in business administration from Southern Methodist University and in 1989 earned an M.A. in Government Studies from Harvard University.

