



Heidi Richardson
Morgan Stanley/Graystone Consulting
Managing Director – Wealth Management
Institutional Consulting Director
Investing with Impact Director

- Over 30 years of investment management experience, specializing in values-alignment
- B.S., Bentley University (Waltham, MA)
- CPM, Columbia University (New York, NY)
- Three years as Managing Director at J.P. Morgan’s Endowments and Foundations Group
- Seven years at BlackRock as Managing Director and Head of ETF Investment Strategy
- 30 year history of designing Sustainable & Values-Based portfolios
- Chair of Board of Oceanites, a nonprofit environmental, scientific and educational climate research organization (Washington D.C.)
- Trustee, The Arboretum Foundation of Seattle
- Member, Seattle Children’s Hospital Corporate Leadership Council
- Councilor, Save The Redwoods League (San Francisco, CA)
- Advisor, Homes4TheHomeless (Santa Rosa, CA)
- Advisor, SeekHaven (San Francisco, CA)
- Frequent speaker at industry conferences and regular financial news appearances on CNBC, Bloomberg and The Street

Ms. Richardson brings more than thirty years of experience in the investment management industry advising investors around the world on asset allocation and portfolio construction. Before joining Graystone, she was a Managing Director for J.P. Morgan in the Endowments & Foundations Group where she led the team’s sustainable and values-based investing practice and was responsible for building and managing client portfolios and providing global market insights to nonprofit organizations and family offices.

Prior to joining J.P. Morgan, Ms. Richardson spent seven years at BlackRock as a Managing Director and the Head of ETF Investment Strategy where she provided clients with macro and market insights and portfolio construction guidance. Prior to joining BlackRock, she was a Managing Director and Senior Portfolio Manager with Alliance Bernstein, and a Vice President and Client Portfolio Manager with both Marsico Capital Management and Goldman Sachs Asset Management. She began her career as a short-duration portfolio manager for the Blackstone Bank & Trust Company. She earned her B.S. degree from Bentley University and the CPM designation from Columbia University. She also holds Series 24, 7, 66 and 63 certifications.

Ms. Richardson is deeply passionate about the environment and human welfare issues. She is Chair of the Board of Oceanites, a nonprofit environmental, scientific and educational organization based in Washington D.C., an Advisor to Save The Redwoods League, and a Trustee of the Arboretum Foundation of Seattle. She is also on the Seattle Children’s Hospital Corporate Leadership Council, and an Advisor to Homes4TheHomeless and SeekHaven.