



Joe Mallen

Chief Executive Officer, Modelist

Joe Mallen is the Chief Executive Officer at Modelist, a platform committed to constructing personalized model portfolios tailored to the needs of financial advisors. Additionally, he is a Strategic Advisor at Helios Quantitative Research, a quantitative insourced-CIO for financial advisors.

Before Modelist, Joe Mallen was the Chief Investment Officer at Helios Quantitative Research. His past roles also include Chief Investment Officer at Sawtooth Solutions, a Senior Analyst at Columbia Threadneedle, and Vice President at AI Advisors, LLC and Mount Yale Capital Group.

Joe's insights have garnered publication in reputable journals and attention from major news outlets, including CNBC, Bloomberg, Wall Street Journal, Barron's, Reuters, MarketWatch, Yahoo, and the Animal Spirits podcast.

Joe's educational background includes a Masters in Finance with a concentration in Quantitative Finance from London Business School and a BSB in Finance from the Carlson School of Management at the University of Minnesota.