



Liyin Bao, CFA
Portfolio Manager

As Portfolio Manager, Liyin “Lanny” Bao, CFA leads Cornerstone Wealth Management’s Model Wealth Program. Since joining the firm in 2012, he has managed the equity and fixed income portfolios in the program. In 2019, Lanny took on leading the Model Wealth Program and Cornerstone’s Investment Policy Committee. He and his team are committed to creating well-researched portfolios for the program that can help our clients pursue their financial goals. Prior to joining Cornerstone, Lanny worked as an investment banking analyst at Citic Securities. He is a CFA® charterholder and a member of the CFA Society of St. Louis. He has a BS in economics and mathematics from the University of Michigan and earned his MS in finance from Olin Business School at Washington University in St. Louis.



Khurram Naveed
Senior Analyst

Khurram Naveed joined Cornerstone Wealth Management in 2017. He is a senior analyst for the Cornerstone Model Wealth Portfolios and is a member of the Investment Policy Committee. Prior to joining the firm, he was a business valuation analyst at Health Capital Consultants. Khurram graduated *cum laude* from the University of Missouri-St. Louis with a BS in Economics. He also earned an MA in Economics and an MBA with honors from the University of Missouri-St. Louis. He is Level III candidate in the CFA Program.



Regina Crook
Trading Specialist

Regina joined the Model Wealth Program team at Cornerstone Wealth Management in 2019. She has experience within the financial services industry, specifically with investment and retirement accounts, since 2013. She previously worked for a small independent RIA building relationships with clients and custodians while managing client accounts and investments. Regina graduated with a bachelor’s degree from the University of Illinois, Urbana-Champaign. Outside of work, she enjoys DIY projects, attending local events, playing sports, coaching her son’s sports teams, and traveling to visit friends and family.