

## **Joseph Leitmann-Santa Cruz, CEO & Executive Director**

### **Capital Area Asset Builders (CAAB)**

Joseph Leitmann-Santa Cruz oversees CAAB's management, strategic planning implementation, and relationships with key funding supporters, private sector employers, media organizations, elected officials in Washington, DC, and individual donors. He is an asset building, financial capability, and financial services professional with 20 years of experience in a broad spectrum of executive management, strategic planning, program & project management, team management, business development, and investment strategy and portfolio management.

Joseph took the helm at CAAB in January 2019. He previously served as CAAB's Acting Executive Director, Deputy Director and Director of External Relations over a period of five years.

Prior to joining CAAB, for over 2 ½ years Joseph was Managing Director of Investment Operations & Portfolio Management at McLean Asset Management, a wealth management firm in McLean, Virginia. Before that position, for over 8 ½ years Joseph was Vice President of Client Services & Managed Accounts at Advisor Partners, LLC, an institutional money management firm in San Francisco, California. His first job was with the San Francisco, California-based global investment management firm Dresdner RCM Global Investors, where he worked with corporate retirement and pension plans throughout the US.

Joseph is a frequent guest speaker and analyst on personal financial planning, tax planning, tax credits for low- and moderate-income families, asset building, and other socioeconomic matters. He is also involved with supporting non-profit organizations in the Washington metropolitan region, including providing pro bono financial planning classes with Washington Area Community Investment Fund (WACIF) and Latino Economic Development Center (LEDC), and having served from 2014 to 2017 on the Board of Directors of Dream Project, Inc. Previously, he has been a Member of the Investment Committee of The Community Foundation for Northern Virginia, Strategy Advisor to the Executive Director of the Hispanic Committee of Virginia, and intern for the United National High Commissioner for Refugees in Ankara, Turkey and Flughafen Frankfurt/Main AG in Frankfurt, Germany.

Joseph holds a BA in International Relations from San Francisco State University. He is also a graduate of the Leadership Greater Washington's Rising Leaders Program (2015), Center for Nonprofit Advancement's Executive Preparation Institute (2017), Georgetown University's Nonprofit Management Executive Certificate Program (2018), Boston College's Certificate in Nonprofit Leadership (2019), the University of Oxford's Executive Leadership Programme (2020), American University's Certificate in Analytics & Management (2021), and University of California, Berkeley-Haas School of Business Executive Leadership Program (2022). Joseph is currently pursuing a Master of Public Policy at American University.

Joseph lives in Arlington, Virginia with his wife and their two children.