

MATCHING CAPITAL WITH OPPORTUNITY



Pacific Oak Capital Markets

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Lee Bastidas

Managing Director of National Accounts

As the Managing Director of National Accounts for Pacific Oak Capital Markets, Lee Bastidas leads the team that is responsible for initiating and facilitating relationships and selling agreements with broker dealer clients. The National Accounts Team is instrumental in introducing sponsor offerings and spearheading the marketing and due diligence process for alternative investment offerings with broker-dealer and investment advisors.

Lee has more than 20 years of industry experience, working across multiple distribution channels and product lines for several well-known financial services companies. Immediately prior to working for Pacific Oak Capital Markets Group, she was vice president of national accounts at KBS Capital Markets Group for eight years. During her tenure at KBS, they raised over \$5B in real estate and non-real estate related products in the independent broker dealer and RIA channels. From 2005 to 2009, Lee was with Principal Funds, as a senior account manager. Lee began her financial services career with Oppenheimer Funds, where she held various roles, including strategic account manager, over a nine year period.

Lee received her Bachelor of Arts Degree from Providence College and resides in Chatham, New Jersey with her husband and their three children.

Education

BA Political Science — Providence College

Designations

Series 7 License

Series 63 License

Securities Industry Essentials® (SIE®) Exam



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