



Raj Sharma, CIMA

Managing Director – Wealth Management

Head of the Sharma Group

Private Wealth Advisors

Merrill Lynch Private Banking and Investment Group

Raj is Managing Director – Wealth Management and Head of The Sharma Group, a high end boutique within Merrill Lynch’s Private Banking and Investment Group and has over three decades of experience in customized investment and wealth management for entrepreneurs, corporate executives, families and institutions. Raj runs a national wealth management practice based in Boston.

Raj was recently recognized by Forbes and Barron’s Magazine as the number one Financial Advisor in Massachusetts and in the top 100 in the country. In addition, Raj has also been recognized by Barron’s Magazine as one of America “All Stars” Hall of Fame list– one of a small group of advisors who have appeared in Barron’s ranking of America’s Top 100 Advisors for ten consecutive years. He was also recognized by the Financial Times of London ranking of top Global Advisors as well as the top advisor ranking in Forbes Magazine for the past five years. He was featured on the inside cover of the September 2019 issue of Forbes Magazine. Raj is also a regular contributor to local and national media on investment strategy, private wealth management and financial planning.

Raj was profiled in a book on Boston, “An Extended Family”, by Boston Globe photojournalist Bill Brett. He is a regular contributor to local and national media and his articles and interviews have appeared in publications such as The Boston Globe, Barron’s Magazine, Wall Street Journal, Financial Times, Fortune, Boston Business Journal to name a few.

Raj is an ardent believer in philanthropy and is involved with several domestic and global organizations. He is a current trustee and former Chairman of The Boston Harbor Island Alliance, a member of the Board of Trustees for Emerson College and a Founding trustee and board member of the American India Foundation (AIF), an organization devoted to disrupting poverty in India through a spectrum of programs. In addition, Raj is Chairman of the Board of Youth LEAD, an internationally recognized organization promoting cultural understanding and tolerance among high school students. In 2013, Raj was the recipient of the “Solas Award” from the Irish International Immigrant Center for his commitment to promoting cross-cultural dialogue and for his inspirational example of achievement and civic engagement as an immigrant. In 2016, he was recognized as one of the hundred most influential people of diversity in Boston by Get Konnected, a networking organization.