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#### AREAS OF EXPERTISE

- Retirement Planning
- Survivorship Analysis
- Education Planning
- Charitable and Family Gifting
- Stock Option Planning
- Estate Planning

#### CREDENTIALS

- Lehigh University, B.S. Banking and Finance
- Certified Financial Planner<sup>®</sup>
- Member of the Financial Planning Association

# KATHRYN W. GERWIG, CFP<sup>®</sup>

## SENIOR ADVISOR

*Kate works as a partner with her clients through the financial implications of life's changes. She uses her communication and analytical skills to translate technical information into understandable language and concepts for her clients.*

#### BACKGROUND

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After 5 years working in New York at J.P. Morgan, Kate made the decision to return to the community where she grew up. Over twenty-five years have since passed and Kate has never second guessed her decision. By closely assisting clients as the dynamics of their personal and financial lives change, Kate truly values her role as trusted advisor.

#### COMMUNITY SERVICE & ACTIVITIES

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- Kate currently serves on several local organizations for her school district, church and historical society
- Civic Music Association, Director and Finance Committee
- 171 Cedar Arts Center, Finance Committee



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COMPREHENSIVE WEALTH MANAGEMENT SINCE 1978