





## CONTACT

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## EDUCATION

Lehigh University, B.S.  
Banking and Finance

Certified Financial Planner  
(CFP®)

Member of the Financial  
Planning Association

# KATHRYN W. GERWIG, CFP®

*Senior Advisor*

## ABOUT

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 a trusted 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.

## CONCENTRATIONS

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



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