

KELLEY MCGOLDRICK, CFA
Commonwealth Financial Network/ Capitol Financial Advisors
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EXPERIENCE

FINANCIAL ADVISOR, CAPITOL FINANCIAL ADVISORS

Responsible for construction, trading, and performance of separately managed equity and fixed income portfolios. Address clients' financial needs in areas of asset management, liability management, tax minimization strategies, and risk management. Work with small business owners to implement employee retirement savings plans, as well as with high net worth individuals on estate plans, wealth transfer, and planned giving.

FINANCIAL ADVISOR, MORGAN STANLEY

Responsible for construction, trading, and performance of separately managed equity and fixed income portfolios. Address clients' financial needs in all areas of asset management, liability management, tax minimization strategies, and risk management. Work with small business owners to implement employee retirement savings plans, as well as with high net worth individuals on estate plans, wealth transfer, and planned giving.

QUANTITATIVE PORTFOLIO MANAGER, WELLINGTON MANAGEMENT COMPANY

Responsible for construction, trading, and performance analysis of domestic equity portfolios for Institutional clients with a minimum of \$500mm in AUM.

INTERNATIONAL QUANTITATIVE PORTFOLIO MANAGER, GRANTHAM, MAYO, & VAN OTTERLOO LLC

Responsible for construction, trading, and performance analysis of international equity portfolios and international derivative based portfolios. Designed and implemented international index-based futures trading, accounting, and performance analysis system. Supervised operations personnel tasked with reconciliation, execution analysis, foreign exchange, and equity settlement.

ASSISTANT VP, ASSET MANAGEMENT, UNITED STATES TRUST COMPANY

Managed the Corporate US equity and debt portfolio. Improved efficiency of securities trading function by designing and implementing standardized procedures. Invested excess cash in federal funds, domestic and foreign certificates of deposit, and corporate, municipal, and federal debt instruments. Expanded the liability base nationally. Doubled corporate borrowing capacity.



EDUCATION



1998

CHARTERED FINANCIAL ANALYST, CFA THE CFA DESIGNATION HAS THE HIGHEST LEVEL OF GLOBAL LEGAL AND REGULATORY RECOGNITION OF FINANCE-RELATED QUALIFICATIONS.

1993

F. W. OLIN GRADUATE SCHOOL OF BUSINESS, BABSON COLLEGE

Master of business administration. Concentration in finance. Magna cum laude graduate. Beta Gamma Sigma Honor Society.

1985

CORNELL UNIVERSITY

bachelor of arts degree. Psi Chi National Honor Society. Dean's List 1984, 1985. NCAA Division I women's varsity gymnast. Magna cum laude graduate.