

### **Professional Summary**

Seasoned financial professional with extensive experience in wealth management, strategic planning, and public service. Recognized for integrity, analytical rigor, and a commitment to ethical practices. Proven leader in financial stewardship, socially responsible investing, and community service. Passionate about fostering economic sustainability and social impact in Hawaii.

### **Professional Experience**

#### **Partner, Chicago Partners Wealth Advisors**

*2020 – Present*

- Manage a growing portfolio of clients, achieving over 20% annual growth in business over five years.
- Advocate for socially responsible investing, expanding ESG initiatives post-merger.
- Provide strategic financial guidance to a diverse client base.

#### **Founder and Principal, Aegis Capital Management**

*1997 – 2020*

- Led a boutique wealth management firm specializing in strategic financial planning and investment management.
- Championed innovative financial strategies tailored to client objectives, growing the firm into a trusted advisory leader.

#### **VP and Client Service Manager, Morgan Stanley Institutional**

*Early Career Role*

- Developed expertise in institutional investment strategies, working with high-profile clients to achieve financial goals.

### **Nonprofit and Community Leadership**

#### **Volunteer, YWCA Kauai**

*2006 – 2024*

- Served as Treasurer and Board Member, contributing to strategic and financial oversight for 17+ years.
- Managed programs like Healthy Money Choices and Wiwo'ole Bridge Housing, empowering survivors through financial literacy.
- Organized and led fundraising efforts, securing vital resources for shelter residents and program participants.

#### **Rotary Club of Hanalei**

*Community Service Chair and Board Member*

- Developed initiatives like "Hanalei Bucks," supporting local businesses and communities during crises.
- Raised \$32,000 in six days for disaster relief efforts, enhancing food security and housing stability.

#### **Founder, Honu Mana**

- Directed a nonprofit supporting women affected by domestic violence, focusing on sustainable income solutions through education and financial aid.

**Volunteer, CASA (Court Appointed Special Advocate)**

- Advocated for children and families through education, resource allocation, and direct service.

**Education and Credentials**

- MBA, Haas School of Business, University of California, Berkeley
- BS in Accounting, cum laude, Leeds School of Business, University of Colorado Boulder
- Chartered Financial Analyst (CFA)
- Certified Public Accountant (Former License)

**Awards and Honors**

- Pro Bono Service Award, National Association of Personal Financial Advisors (NAPFA), 2019
- Na Wahine Alaka'i O Kauai Award, YWCA Kauai, 2023

**Skills and Expertise**

- Strategic Financial Planning and Analysis
- Economic Forecasting and Revenue Projections
- Fundraising and Philanthropy
- Public Speaking and Advocacy
- Program Development and Implementation
- Socially Responsible Investing