



## **Kathryn W. Gerwig, CFP®**

**Account Executive**

**John G. Ullman & Associates, Inc.**

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***Kate works with her clients through the financial implications of life's changes.***

***She uses her strong communication and analytical skills to translate technical information into understandable language and concepts for her clients.***

### **Credentials**

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

### **Community Service**

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

### **Background**

After 5 years working in New York at J.P. Morgan, Kate made the decision to return to the community where she grew up. Twenty years have since passed and Kate has never second guessed her decision. Her experience on Wall Street has been extremely valuable in her role at JGUA, allowing her to assist her clients in various areas of financial planning and investment management. According to Kate, it's the best of both worlds.

### **Areas of Expertise**

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

