

WENDY O. HAMILTON

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Qualification Summary

- Certified Financial Planner®
- Highly skilled in creating sound investment solutions and facilitating effective financial management strategies to increase portfolio value.
- Provide analysis and reporting for multiple model portfolios and products.
- Manage the Financial Planning process, produce detailed Financial Plans and provide implementation and review of plans.
- Experienced in forecasting, account performance analysis, investor relations and research.

Professional Experience

Private Family Office: **1994 to Present**
Portfolio Manager/Financial Consultant

- Manage a large multi-manager portfolio for a high net worth family.
- Review and analyze investment opportunities, in both the public and private markets.
- Oversee private equity investments and managers.
- Manage trust accounts for multiple generations.
- Participate in the tax planning and estate planning of the portfolios.
- Work with budgeting and expense control.
- Interact with outside money managers and venture capitalist.

Riverplace Capital Management: **2007 to 2016**
Vice President and Portfolio Manager

- Member of the Investment Committee at Riverplace Capital Management.
- Responsible for selecting securities and management of select sectors of various portfolios.
- Produce portfolio model analysis for multiple portfolios and products.
- Manage the Financial Planning process, produce detailed Financial Plans and provide for implementation and review of plans.
- Interact with outside money managers and other financial vendors.

Barnett Bank Inc.: **1993 to 1994**
Marketing Specialist

- Coordinated marketing programs for Merchant Services.
- Worked on launch of Debit Card Processing program for Barnett Bank.

Education

- The Heavener School of Business at the Warrington College of Business, University of Florida -- Bachelor of Science in Business Administration, May 1991.
- Certified Financial Planner License, Summer 2007

Community/Volunteer

- Board of Trustee, The Bolles School 2012 - Present
- Women's Giving Alliance 2014 - Present
- Bolles Parent Association 2001 to 2012
- YWCA/Community Connection Board of Trustees 1996 to 1998