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PROFESSIONAL SUMMARY

Business journalism – investment industry (2005 – present):

Contributing journalist for national, state and regional publications, with primary focus on business trends and issues. Topic areas: investment industry, financial adviser practice management, personal finance, legislation, insurance, banking, technology, economic development, regional overviews, professional and corporate profiles. Thorough researcher, skilled interviewer, energetically enterprising. Flexible schedule, excellent knowledge of grammar, able to work quickly, reliably. Able to take photos to accompany stories.

- **Financial Advisor Hub of CNBC.com**, regular contributor, November 2013 to present.
- **Investment News** (national weekly newspaper for investment advisors), September 2005 to 2022. Topics included emerging markets, minority advisers, “green” investing, elderly issues in financial planning

Business writing (2001 – present): Website content, blogs, editing for financial advisors; technical writing, press releases, marketing communications, training manuals, brochures, newsletters, scripts, websites, grants, educational materials, technical product summaries

College teaching (2013 – 2019): Online instructor, Post University, Waterbury, CT - Teaching Managerial Communications and Personal Finance to undergraduates

Author (2019): [“The People’s Guide to Finding the Right Financial Advisor: Demystifying the Financial Advice Industry for Everyday People”](#)

EDUCATION

Bachelor of Arts, History, Brandeis University, Waltham, MA;
Master of Arts, Management / Human Resources Development (dual major),
Webster University, Jacksonville, FL

Continuing education:

- CFA Institute Claritas® Program (self-study): Passed the Claritas® exam and awarded the *Claritas® Investment Certificate* (now called **Investment Foundations**)
- Reynolds Center at API online seminars: *Covering Personal Finance, Covering Private Companies*
- CFA Institute *Financial Analysis for Journalists* series: *Understanding Security Analysis and Corporate Disclosure* series (self-study)

PROFESSIONAL AFFILIATIONS

Society of American Business Editors and Writers
American Society of Business Publication Editors (*Board Member, NYC Chapter*)