



George Walter

- Type of analytical activity: investment planner, strategic development department;;
 - General competence:
 - Cash flow planning , investment management , retirement planning , insurance planning, estate planning
 - accounts under management - 35;
 - investment portfolios in progress - 21;
 - pamm accounts - 2;
 - staking funds under management - 8;
- Capital in management: \$20.6 million.

- Professional experience::

Experience in analytical activities: 13 years;

- 3.5 years of partner activity in BLACKROCK INVESTMENTS, LLC as Operations Professional
- 2.5 years at WELLS FARGO SECURITIES, LLC (CRD#:126292)/ Administrative Assistant
- 2.5 years of activity in the insurance organization / FOUR POINTS CAPITAL PARTNERS LLC (CRD#:43149)
- 4.5 years of activity NEXBANK SECURITIES INC (CRD#:133267):Business Unit Compliance Officer

- Education:

Master of Finance, Columbia University, New York
August 2008 - August 2010

Graduated with High Honors.

Bachelor of Finance and Economics, Fordham University, New York
August 2004 - May 2008

- Qualification:

State Securities Law Exam 02/02/2010
SIE - Securities Industry Essentials Examination / 09/22/2017
Series 99 - Operations Professional Examination / 10/01/2018

