



# Laura Whitlock

## Contact Info

📞 +12067799901

✉️ laurawhitlock@gmail.com

🌐 <https://www.laura-whitlock.com>

## Education

Harvard University

MBA Finance

2014 - 2018

MIT

Chartered Financial Analyst (CFA)

Level III Candidate

2018 - 2020

## Skills

- Strategic Investment Planning
- Financial Risk Assessment & Management
- Client Relationship Management
- Asset Allocation & Diversification

## Portfolio Manager

Hi I am a portfolio manager with over 10 years of experience helping clients achieve their financial goals. My passion for investment management goes beyond numbers—it's about understanding each client's unique aspirations and crafting tailored solutions that deliver results. Whether it's managing portfolios with assets over \$50M or transitioning to sustainable investments, I focus on strategies that not only grow wealth but also provide peace of mind.

## Work Experience

- Successfully managed a portfolio of over \$50M in assets, optimizing performance and ensuring consistent growth. Demonstrated expertise in strategic asset allocation, risk management, and maximizing returns for stakeholders.

2023 - 2024

- Over 10 years of experience in developing and implementing investment strategies, with a strong track record of driving portfolio growth and delivering optimal returns. Proven ability to adapt to market trends and manage risk effectively.

2022- present

- Proven leadership in financial planning, guiding teams to create comprehensive strategies that drive long-term financial stability and growth. Expertise in aligning financial goals with client objectives while optimizing resources and minimizing risk.
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