



Financial Planner

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About Kate

Kate Reilly is a Financial Planner with the Reilly Financial Group, a financial services organization known for its specialized team and the personalized advice and guidance they provide to clients as they build their financial security.

Kate is dedicated to providing clients with integrated financial solutions and works with individuals, families and business owners as they look to build financial security through every stage of life. As part of a specialized team, she is able to tap into a wide range of planning resources and provide clients with integrated and customized solutions to help them successfully fulfill their financial goals and objectives.

Clients benefit from Kate's commitment, expertise and personal focus. Kate's ultimate goal is to enrich the quality of her clients' lives by helping them not only achieve their financial goals, but protect their income, family and legacy at every stage of their lives.

Areas of Focus

- Retirement Planning
- Investment Services
- Employee Benefits
- Protection & Insurance
- Business Planning Solutions

QUALIFICATIONS & PERSONAL INFORMATION:

- Licensed to offer Life & Health and Annuities in ID, MD, NJ, NY, PA
- Licensed to offer Securities Products in ID, NJ, NY, PA
- Licensed to offer Life & Health in CT, KY
- Licensed to offer Life in GA, TN

EDUCATION:

Amherst College – B.A. in Psychology. Coursework in Economics

PROFESSIONAL AND COMMUNITY ORGANIZATIONS:

- MassMutual Mid-Atlantic Women's Advisory Board
- Women in Financial Services - North Jersey Gateway Chapter Member

Community Activities include:

- Fellowship of Christian Athletes
- Center for Faith Justice Volunteer