PLAN

PROFESSIONAL LIFE ADVISORS NETWORK

Katie Clark, CFP®

BKA Financial
Corporate Office
244 W. Water Street, Suite 200
Elmira, NY 14901
Email: Katie.Clark@bkafinancial.com
Office: 703-534-7734
Cell: 410-961-4831

As a Certified Financial Planner™ and former Financial Advisor with over 20 years of industry experience, Katie serves as an advanced planning consultant to Financial Advisors, helping them to identify, develop and capitalize on advanced wealth planning opportunities for their high net worth clients.

Her main focus is to help clients determine the most appropriate strategies and solutions to support them in accomplishing their goals for protecting and preserving their wealth, while also designing an efficient plan to ultimately distribute their wealth to the people and causes that are of the most importance to them.

"By addressing both the human and financial aspects of a client's wealth through a disciplined and coordinated planning approach, you can identify their blind spots, educate them on their options and help them plan accordingly."

Before joining BKA Private Wealth Consultants in 2011, Katie was a Divisional Manager at Morgan Stanley with their high net worth Wealth Advisory Solutions group. Her role was to enhance and strengthen the firm's most valued client relationships by helping to solve their complex wealth planning needs. She has held both Financial Advisor and specialist roles with the top financial firms in the industry such as UBS, Morgan Stanley, Smith Barney and Legg Mason, starting her career with Merrill Lynch, in 1995.

Katie holds Series 7, 63, 65, Life and Health licenses, is LTC certified and earned her CFP® designation in 2003.