



Wealth Management Research

Kathleen McNamara CFA, CFP®

Senior Municipal Bond Strategist

Education

Kathleen McNamara holds a B.S. in Finance from St. John's University, Queens, New York.

Professional History

Kathleen joined Wealth Management Research (WMR) in January 2006 as a supervisory analyst and member of the Research Review Committee. Prior to joining WMR, Kathleen worked in Investment Solutions within the Portfolio Strategy Group and was the Municipal Bond Strategist for private clients in the Municipal Securities Group.

With over 20 years experience in the financial services industry, Kathleen has also worked at Lehman Brothers and Smith Barney developing municipal bond portfolio strategies for high net worth individuals, small corporations, and private clients.

Professional Affiliation

Kathleen is a Chartered Financial Analyst® and a Certified Financial Planning® certificant. She holds Series 7, 16, 24, 53, 63, and 66 securities licenses and is a member of the CFA Institute, New York Society of Securities Analysts (NYSSA), NYSSA Private Wealth Management Committee, and the Municipal Bond Club of New York.