

## MARIN ADVERTISERS SPEAK UP

**Kathleen Nemetz**, financial planner at McClurg Capital Corporation

Financial planner and certified divorce financial analyst Kathleen Nemetz, MBA, CFP, CDFA, helps create road maps to help people fund their financial lives. These plans can protect her clients while guiding their ongoing investment or financial decisions. She offers a fee-based service as well as traditional investments. Her practice is located with McClurg Capital Corporation, in San Rafael, a member of FINRA and SIPC. Her affiliation with the investment boutique McClurg Capital affords her clients uncommon personal service combined with the financial strength and custodial services of the Pershing division of the Bank of New York Mellon.

**What was your first investment?**

Microsoft stock shortly after the initial public offering. I was 29 years old.

**Describe your competitive edge.**

From my own personal experience and travels, I know that life can be greatly simplified. I lived abroad for seven years and apply my knowledge of different lifestyles when suggesting changes to people who need to transition to other life choices. I also work

in collaboration with other professionals, for instance, attorneys and CPAs in the Collaborative Law Practices of Marin and San Francisco. My practice affiliation with McClurg provides a high level of personal service as we are a small boutique firm with the safety of a big bank behind it. We clear through Pershing LLC, owned by the Bank of New York Mellon.

**What are some of the life issues you help clients resolve?**

Many of my clients are going through transitions such as retirement or divorce. Sometimes the transition is related to end-of-life decisions, concerning estate planning. Whatever the issues, I help my clients inventory what their assets may be. We also discuss what decisions are necessary to fund any goals.

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