Trish's Experience:

Employment:

- Corporate Cash Management Advisor; Seattle First National Bank, 1980-1982
- Financial Consultant; Merrill Lynch 1983-1993
- Portfolio Manager; US Bank Private Client 1993-2000
- Senior Portfolio Manager; Wells Fargo Private Client 2000-2003
- Vice President/Investment Advisor; Lesa Sroufe & Co. 2004-2006
- Owner/Investment Advisor; Patricia Howe Registered Investment Advisor LLC, 2006-2008
- Financial Advisor; Morgan Stanley 2008-2012
- Owner/Investment Advisor; Howe Financial Advisory LLC, 2012 – present

Education:

- University of Washington; B.A. Business Administration, Finance; 1977
- University of Pennsylvania, Wharton School; Investment Management Analyst Program; 2002
- Boston University; Professional Education, Financial Planning; 2008

Designations:

- Certified Investment Management Analyst (CIMA®); 2002-2012
- Certified Financial Planner® Professional (CFP®); January 2010 – present

Licenses:

- Registered Representative NYSE; 1983- 2006, 2009-2012
- Washington State Insurance Agent; 1983-1993; 2008-2012
- Investment Advisor Representative; 2004-present

Memberships/Associations:

- Member, Financial Planning Association of Puget Sound; 2012-present
- Member, Investment Management Consultants Association; 2002-2012
- Member, Seattle Society of Financial Analysts; 1993-2004
- Volunteer Consultant,501 Commons; 2004-present
- Treasurer/Board Member, Ryan Hill Research Foundation; 2002-present