
Litman Gregory Wealth Management appoints Chief Compliance Officer



Walnut Creek, CA - April 28, 2022. iM Global Partner has hired Kathlyne Kiaie as Director - Chief Compliance Officer of Litman Gregory Wealth Management. Kathlyne joined as of April 18, reporting to Jeff Seeley, CEO Litman Gregory Wealth Management.

Jeff Seeley, CEO of Litman Gregory Wealth Management said: “With the addition of Kathlyne, the continued support of Amanda Balitsky in the role of VP - Compliance, and Jennifer Ceccarelli now fully focused on her role as COO of our Wealth Management business, the foundation of our Compliance, Operations and Client Service areas are well positioned for the important work we have ahead.

“Jennifer is a leader in our wealth management business, and I welcome her now being able to fully dedicate her efforts to continue to strengthen our Operations, Client Service and IT areas moving forward. She has done a wonderful job handling the responsibilities of COO and CCO through the important transition period of Litman Gregory Wealth Management and iM Global Partner,” he added. We are convinced that this strong operational organization will support our first objective to serve our clients with the highest business standards. It will also support our acquisition strategy in the wealth management space.

In her role as CCO, Kathlyne brings more than 15 years’ experience as a Registered Investment Advisor CCO along with experience building and managing operations workflows required in the creation, due diligence, and sale of SMA, traditional and alternative investment funds. Most recently she served as CCO of Freestone Capital Management where she was responsible for ensuring compliance with regulations, identifying, and documenting regulatory risks and assisting the business in developing controls.

About Litman Gregory Wealth Management

Founded in 1987, Litman Gregory Wealth Management is a San Francisco Bay Area firm and a pioneer in providing independent wealth management services. For over three decades, Litman Gregory has focused on providing in-depth investment research and personalized wealth management to individuals and multigenerational families to help them achieve their financial goals. The company also supports nonprofit organizations by serving as their fiduciary partner and outsourced chief investment officer. Litman Gregory Wealth Management is owned by iM Global Partner.

About iM Global Partner

iM Global Partner is a worldwide asset management network. It selects and builds long-term partnerships with talented and independent asset management companies through direct capital ownership. iM Global Partner is present in 13 locations across Europe and the United States and provides its clients with access to the best management strategies of its Partners. It represents around US\$37 billion of assets under management as of March 2022.

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