



## Kathleen Devine

**Personal CFO, Master's in Taxation, Inactive CPA**

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Kathy provides more than 30 years of experience in financial management and family office services, establishing herself as a trusted figure in the industry. As the owner of a Multi Family Wealth Office since January 2003, Kathy has successfully overseen the financial well-being of 12 ultra high net-worth families nationwide, managing approximately \$1.5 billion in assets. She offers a comprehensive array of services to her clients, including consolidated statements of net worth, cash flow management, coordination of tax compliance and planning, implementation of estate planning goals, financial analysis and bookkeeping for side businesses and financial literacy for the next generation.

Kathy's illustrious career also includes pivotal positions at Bank of America, Barnett Bank, Harris Corporation, and Ernst & Young. Along the way, Kathy has honed her proficiency across a wide range of accounting and financial services including financial reporting, forecasting, mergers, acquisitions, and taxation, consistently demonstrating her commitment to excellence.

### PROFESSIONAL EXPERIENCE:

- Multi-Family Wealth Office (Owner)
- Bank of America/Barnett Bank
- Harris Corporation
- Ernst & Young

### EDUCATION & CERTIFICATION:

- Masters of Taxation - University of Central Florida College of Business
- Bachelor of Science, Accounting - Florida State University
- Certified Public Accountant - Florida (Inactive)

### PROFESSIONAL AFFILIATIONS:

- American Institute of Certified Public Accountants

### COMMUNITY INVOLVEMENT:

- Tom Coughlin Jay Fund Foundation - Helped develop the financial literacy program for families dealing with childhood cancer. Continues to function as a Financial Coach, conducting annual seminars for families.
- Holy Family Catholic Church - Finance Committee