



NEWPORT CAPITAL GROUP

**Joanne Spears, AIF[®], CFP[®],
CRPC[®], CSRIC[®]**

Senior Vice President Financial Planning

E: JSpears@NewportCapitalGroup.com

P: 732-741-8400



Joanne brings her deep knowledge of the markets, investments, and risk management to her current role as Senior Vice President, Financial Planning with Newport Capital Group. She and the Newport Capital Group team assist clients, comprised of individuals, families, and businesses, achieve their financial goals through detailed wealth planning and customized strategies. Joanne also leads the company's Financial Wellness Initiative.

Joanne previously worked with Merrill Lynch Wealth Management as a Senior Financial Advisor. She has acquired a diverse set of skills and experiences during her 35-year career in finance, from announcing local grain prices on the radio for Cargill to constructing Energy hedging strategies for transportation companies, trading and brokering derivatives, and running a boutique hedge fund in NYC.

She actively supports her communities, serving as Board Trustee, Two River Theater Company, Board Member and Membership Chair, Executive Women of New Jersey, Finance Committee Member, Community YMCA of Greater Monmouth County, and Board Advisor, EDSnaps (NYC-based Nonprofit inspiring female-identifying students to pursue education and careers in STEAM fields).

Joanne graduated from the University of California, Davis with a bachelor's degree in international relations and a minor in Japanese. Joanne and her husband reside in Freehold, New Jersey.