



NEWPORT CAPITAL GROUP

Jocelyn DeGroote-Venables, AIF[®], CFP[®]

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As Senior Vice President Financial Planning, Jocelyn DeGroote-Venables, CFP[®], brings over 23 years of experience in the financial services industry. She is responsible for developing, supporting and managing client relationships, thinking both strategically and tactically to identify financial planning solutions appropriate for each client's situation. Prior to joining Newport Capital, Jocelyn spent most of her career as a High Net Worth Financial Planning Specialist at Merrill Lynch. She worked with clients to understand their overall financial situation and implement a strategic plan to help them realize their goals. She also worked with the managed money platforms, constructing, analyzing and implementing managed portfolios for private clients. During this time, she completed her education requirements and passed the exam to earn her CERTIFIED FINANCIAL PLANNER[®] (CFP[®]) designation. She currently holds the Accredited Investment Fiduciary[®] (AIF[®]) designation from fi360, Series 7 and Series 66.

Jocelyn graduated with a Bachelor of Arts in Economics from Villanova University. Jocelyn and her family reside in Brielle, New Jersey.