



NEWPORT CAPITAL GROUP

Kate Roselli, CFP®

Vice President Financial Planning

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Kate Roselli, CFP®, is Vice President Financial Planning at Newport Capital Group, where she provides holistic financial planning and advice to clients. She is responsible for identifying and integrating financial planning solutions appropriate for each client's situation.

Kate joined the team in 2011 as a Marketing Associate, helping the sales and marketing team with various responsibilities, including preparing for meetings, event coordination, business development activities and target market research. Soon after joining, she became Executive and Family Office Assistant to the founder and his family, responsible for coordinating and managing the family's financial, personal and household needs with accountants, various attorneys and professional staff. This role led her to discover an interest in Private Wealth and assisting the team in meeting preparation, client service, operations and planning analytics.

Kate has earned the CERTIFIED FINANCIAL PLANNER™ (CFP®) designation. She received her Bachelor of Science in Employment Relations from Rutgers University in 2011. Kate was an honoree of the 2023 Girl Scouts of the Jersey Shore Phenomenal Women Under 40. She is a member of the Girl Scouts of the Jersey Shore Board of Directors and a member of the Silver and Gold Award Committee. Kate lives in Tinton Falls, New Jersey.