



## **Katrina Ellis**

Senior Registered Wealth Associate

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If you were to sum up Katrina Ellis's role as Senior Registered Wealth Associate into one phrase, it'd be striving to make life easier for others. As a Senior Registered Wealth Associate, Katrina is responsible for handling all administrative tasks for her financial advisors and their clients. To better serve those clients, she earned her Series 7 and 66 licenses which allows her to also place trades when needed. Additionally, she handles various office management responsibilities and acts as a resource for operational efficiencies for other associates.

Katrina joined Seventy2 Capital in 2022 with over twelve years of experience in the industry. Throughout her career, she has worked at places like Wells Fargo Advisors Private Client Group, WF Home Mortgage, and Allstate Insurance. Her work has always gone beyond just client service-she loves building deep bonds with clients, so they feel comfortable enough to ask questions, express concerns, or just chat!

Katrina grew up in Southern Maryland and crisscrossed the nation before ending up back in her hometown in 2016. She is an alum of the University of North Carolina, where she earned a Bachelor of Science degree in Business Administration. Outside of work she and her husband are raising their two boys, and in her free time, you'll find her cheering them on at different Travel Baseball tournaments all around the east coast.