

# Stoker Ostler

## Stacy Culotta is an Associate Portfolio Manager at Stoker Ostler.

Stoker Ostler is a wealth advisory firm serving more than 600 individuals and families, across the United States and internationally, overseeing more than \$1 billion in assets under management.

Stacy Culotta works directly with Mike Bolar and Chad Bruening as an Associate Portfolio Manager. Stacy's duties include active portfolio rebalancing, daily cash monitoring, building client relationships and performing various research projects and analyses. She is focused on delivering a positive customer experience with each of her clients. Stacy joined Stoker Ostler in 2015. Stacy's previous experience includes Branch Management with BMO Harris Bank for nine years as well as being a Financial Advisor with AXA Advisors and Chase Bank.

Stacy received a bachelor's degree from Arizona State University and will be enrolling in an MBA program in 2015. Her diverse background demonstrates her ability to apply her leadership skills, operational capabilities and analytical skills to help provide solutions for her clients.

Stacy enjoys spending time with her family, which includes her husband and two children. She also enjoys running, swimming and biking.



### Stacy Culotta

Associate Portfolio Manager

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Stoker Ostler helps affluent individuals and families reach their financial goals through:

- Financial Planning
- Tax Planning
- Retirement Planning
- Estate Planning
- Portfolio Management

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