

# KIMBERLY MALESKY

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## OBJECTIVE

To educate clients on their finances, investments and planning for their family. Supporting clients' goals and objectives as they navigate their personal financial journey.

## EXPERIENCE

### December 2020 - Present

Founder, Advisor for Harmony Investment Management, LLC

### February 2017 - November 2020

Partner at Monarch Wealth Strategies

### February 2014 - November 2020

Financial Advisor with Monarch Wealth Strategies

### August 2008 - February 2014

Financial Advisor with Mission Wealth Management

### October 2007 - August 2008

Financial Consultant with A.G. Edwards & Sons, Inc.

### June 2003 - October 2007

Financial Analyst with Raytheon Company

## EDUCATION

**Baker College, Michigan-**  
MBA

**CSU, Chico State, California-**  
Undergraduate degree in  
Business Administration-  
Emphasis: Financial Services &  
Human Resource Management

## KEY SKILLS

- INVESTMENT  
MANAGEMENT
- RETIREMENT PLANNING
- ESTATE PLANNING
- TAX PLANNING
- INSURANCE PLANNING
- STRONG SPEAKING SKILLS
- DIVORCE PLANNING

## CERTIFICATIONS

- SERIES 7
- INSURANCE LICENSE
- CFP® DESIGNATION
- CDFA® DESIGNATION

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## COMMUNITY INVOLVEMENT

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Giving back my time, my most valuable commodity, to the Community is of immense importance to me.

- Isla Vista Elementary School Big Sister/Little Sister Program
  - Raytheon Diversity Council Member & Committee Lead
  - Charter Member/Treasurer of Santa Barbara Rotaract
  - Member of Junior League of Santa Barbara
  - Participant in Team in Training
  - Committee member for Storyteller Planned Giving Committee
  - CASA Volunteer- Court Appointed Special Advocate
  - Fast Pitch Coach, Santa Barbara Chapter
  - Kathryn Harvey Fellows Graduate
  - Santa Barbara Sunrise Rotary Club- Fundraising Director
  - Music Academy of the West Compeer Program
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