



Katina Aziz is a wealth management executive and trusted partner to Ultra-High Net Worth Individuals (UHNWI). Through her comprehensive knowledge and solid business acumen that spans more than 15 years of broad-based financial expertise, Katina, with the support of her team, executes her clients' financial goals, organizes their assets, and ensures efficiency in the day-to-day running of their financial lives. As President of KORE Consulting LLC, Katina provides extensive financial analysis and operational structuring to individuals and family offices with collective reporting and analytics, operations, and infrastructure on all assets that comprise their net worth.

Katina began her career at E\*Trade Capital Markets on their institutional trading and sales team where she obtained her Series 7 & 63 licenses and served as a sales analyst for 5 years. Following her time at E\*Trade Capital Markets, Katina joined Millgate Capital Inc., a fund manager with a long/short value equity strategy, that at its height held \$2B in AUM. While there, Katina held various roles in client services and operations. Subsequently, Katina joined LyonRoss Capital Management as its Head of Operations where she managed the build-out of a proprietary order management system and the company's compliance registration with the SEC. Katina's final stopping place before formulating KORE was as a partner and analyst at Fulmar Advisors Limited in the Bahamas where she oversaw all aspects of a Bermuda-based hedge fund, whose strategy was global opportunistic. During her 4 years at Fulmar Advisors, Katina simultaneously managed the family office of Fulmar's President, which included a well-diversified portfolio of real estate, direct ownership of multi-million-dollar corporations, private equity, venture capital, artwork, and vehicles.

Katina holds a BBA in International Business from Berkeley College and an Executive MBA from NYU's Stern School of Business with specializations in Quantitative Finance, Finance, and Marketing.