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# Christine M. Van Meter, MBA

536 E. Main Street • Little Falls, NY 13365 • (315) 823-9200

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## SUMMARY

With an MBA from Boston University and over 22 years in the financial and insurance industry, Christine has successfully helped many clients to prudently accumulate wealth while in their working years, to happily live on that wealth in their retirement years, and eventually to effectively pass that wealth on to their chosen heirs without unduly enriching the government.

As a former Army paratrooper who reached the rank of Captain and served in several critical staff positions, Christine is used to helping people plan and make informed decisions. But as a mother of six and a business owner in the Mohawk Valley, Christine also knows the way that life can throw an unexpected curveball to upset the best-intended plans. For both of these reasons, Christine prides herself on helping clients to create realistic paths to achieving their financial dreams.

Even though she grew up on a beef farm in Upstate New York, Christine began her financial industry career in Boston at the Bank of New England in 1988 before relocating back to Central New York in 1994, where she worked with Fleet National Bank, the Herkimer County Trust, Savings Bank of Utica and Partners Trust in capacities ranging from operations to branch manager to investment representative. In 2007 she joined Cadaret, Grant as an independent financial advisor.

Christine is actively involved in the community as a member and former President of the Rotary Club, the organizer of the annual Christmas in Little Falls festival, and an organizer of the Little Falls Community Garden. She supports her children in sports, and has coached numerous community soccer teams and softball teams.

## PRÉCIS OF PROFESSIONAL EXPERIENCE

### *Independent Financial Advisor (2007-Present)*

In October of 2007, Christine left the banking investment sales industry and formed Choice Investments, LLC, a full-service investment and insurance firm, along with two partners. In 2011, she established Van Meter & Van Meter, LLC to operate an independent branch office in Little Falls, NY, which services over 350 investment clients with over \$70 million in assets under management.

### *Various Regional Banks (1988-2007)*

After leaving the Army, Christine worked for a series of regional banks: Bank of New England, Fleet Bank, Herkimer County Trust, Savings Bank of Utica and Partners Trust Bank. She started as a Management Trainee and worked her way up to Vice-President, serving in various capacities in Operations and Purchasing, as a Branch Manager, and finally as an Investment Professional.

## MILITARY SERVICE

Christine served as a commissioned officer in the United States Army from 1981 to 1988, attaining the rank of Captain. She served in the Engineer Corps and then in the Transportation Corps, with assignments in Virginia, Hawaii and Kentucky, and she completed both Airborne and Air Assault training.

## EDUCATION

- **MBA**, Boston University (1993)
- **BA** in Economics, SUNY Potsdam (1981)