

# CHRISTINE GAZE, CIMA®

## FOUNDER AND MANAGING PARTNER



Christine Gaze is the founder and managing partner of Purpose Consulting Group, LLC, a practice management consulting firm that develops comprehensive thought leadership and training programs to engage and advance financial professionals. Over the course of her career, she has developed programs that have influenced top advisors in all channels and generated billions in new assets.

Christine is the former Head of Practice Management at TD Ameritrade, where she and her team developed a practice management platform to attract and educate mega advisors. Previously, she was Managing Director and Head of Professional Development at AllianceBernstein and was instrumental in the formation of the practice management consulting group at Wachovia Securities. Christine is also intimately familiar with educating advisors in the field, having led private banking sales teams at both Morgan Stanley and Prudential Securities. Christine built her foundation in financial services as a successful advisor at Merrill Lynch which continues to inform her approach to this day.

At Purpose Consulting Group, Christine has developed a suite of content and training programs in two domains: wealth management and human capital. Her core programs, Planning with Purpose™ and the CEO Mindset™ provide immersive learning experiences for advisors seeking to provide more comprehensive financial planning and enhance team leadership skills. Christine regularly conducts qualitative research studies on a variety of topics including financial planning fees, longevity planning, intergenerational wealth conversations, and high-performing teams.

A frequent speaker at industry event and writer for industry publications, she is often quoted in the press, including The Wall Street Journal, Financial Planning, and Investment News.

Christine is a member the Board of Directors for the Investments & Wealth Institute™ (IWI), an industry non-profit that provides professional credentials and advanced education to seasoned financial advisors. She also serves on the Executive Committee of IWI as the Vice Chair of Professional Development and contributes to several planning committees.

She is also a Director for the newly formed IWI Foundation Board whose mission is to promote diversity and inclusion by providing scholarships to women and diverse candidates. Christine volunteers her time in the community as a counselor at Bottomless Closet, a non-profit that is committed to connecting women with work.

Christine earned a B.S. with honors in Psychology and Business Administration with a concentration in Finance from the State University of New York College at Brockport. She holds the Certified Investment Management Analyst® (CIMA®) certification, administered through the Investments & Wealth Institute™ and taught in conjunction with The Wharton School, University of Pennsylvania.

Christine resides in Darien, CT with her family. Together they are always in search of the next great adventure where they can indulge their love of hiking, biking, and eating.