

Join us in welcoming Neil Cataldi and Ann Marie Liotta to the Advisory Board of Starboard Advisors.



Neil Cataldi* **Vice President- The Viking Group**

Neil Cataldi currently serves as Vice President and leads the investment process for \$250Million+ in holdings at the Viking Group, a family office in Cherry Hill, NJ. Mr. Cataldi has over 20 years of Wall Street industry experience across equities, options, alternatives, and Family Office governance. He began his career on the floor of the Philadelphia Stock Exchange where he worked for both TFM Investment Group and Goldman Sachs. He then worked as a derivatives strategist at Susquehanna International Group, generating stock and option trading ideas, mainly within the Consumer sector. Neil has also consulted for multiple private Family Offices managing a range of investments, including actively managed equity and fixed income portfolios, as well as the oversight and management of a large portfolio of hedge funds.

*Neil is an Investment Committee member in addition to Advisory Board position.



Ann Marie Liotta, CPA, AEP® **U.S. Wealth Strategist- Cohn** **Financial Group**

Ann Marie is an engaging specialist in domestic wealth planning and a results-driven wealth and tax strategist. Her significant and sophisticated hands-on experience and technical knowledge were gained over her 26-year professional career working within large New York-based financial services businesses as well as regional Philadelphia accounting firms.

Ann Marie joined Cohn Financial Group as a Wealth Strategist and Producer. She specializes in complex life insurance planning and specialized in Private Placement Life Insurance (PPLI). She works with high net worth families, individuals, RIA's and family offices throughout the United States. Prior to joining CFG, Ann Marie worked at Lombard International for three years as their Head of Product Development and Wealth Structuring Services for the U.S. In her role at Lombard, she assisted internal and external partners with understanding private placement solutions and incorporating the solutions in existing and new wealth plans.

Prior to joining Lombard International, Ann Marie provided a full range of tax compliance and consulting services for individuals and families, where she headed up the Private Clients Services practice of Ernst & Young (EY) in Philadelphia. She practiced as a Certified Public Accountant for 23 years before joining the insurance industry five years ago. Ann Marie graduated Magna Cum Laude from Rutgers College School of Business. In addition to holding her insurance license, Ann Marie holds her CPA license in New York, New Jersey and Pennsylvania and is designated as an Accredited Estate Planner®. Ann Marie is a New Jersey State elected official and just completed her tenure on the Board of Education into Moorestown, New Jersey.