

Contact

www.linkedin.com/in/craig-colbath-16031416 (LinkedIn)

Top Skills

Series 7

Series 63

Wealth Management

Certifications

Chartered Retirement Planning
Counselor

Craig Colbath

Chief Operating Officer at Pasadena Private Financial Group, LLC
Pasadena, California, United States

Experience

Pasadena Private Financial Group

Chief Operating Officer at Pasadena Private Financial Group
January 2019 - Present (5 years 2 months)
Pasadena, California, United States

The Colbath Consulting Group

Principal
March 2016 - December 2019 (3 years 10 months)
Pasadena, CA

Singpoli Financial Services, LLC

Managing Director
July 2016 - January 2019 (2 years 7 months)
Pasadena, CA

Merrill Lynch

21 years 9 months

Market Executive

January 2010 - December 2015 (6 years)
Pasadena, CA

As the Market Executive of the California Valley Market, I have the privilege of leading a group of 200+ professionals who serve clients in the United States and Asia. Our team includes over 140 Financial Advisors, sixty plus Client Associates and Operational staff, eight Producing Managers, and seven Service and Risk Managers.

In addition to my responsibilities as a Merrill Lynch Market Executive, I work closely with my counterparts at Bank of America N.A. to bring the entire enterprise to benefit our clients. I am a member of the San Gabriel Valley Regional Council for the Bank and also sit on the Market President's Committee for the Los Angeles market.

Associate Director

August 2007 - January 2010 (2 years 6 months)
Princeton, NJ

Senior Resident Manager

May 1998 - July 2007 (9 years 3 months)

Portland, ME

Financial Advisor

April 1994 - July 2007 (13 years 4 months)

Financial Advisor in Charge

April 1997 - May 1998 (1 year 2 months)

Potsmouth, NH

Colbath & Associates

Sales Manager

May 1983 - January 1994 (10 years 9 months)

Education

University of Massachusetts at Amherst - Isenberg School of Management

Bachelors, Accounting · (1979 - 1982)

University of Massachusetts, Amherst

Minor, English · (1979 - 1982)