



Olivia LaRocco

Client Service Associate

As a Client Service Associate at Gresham, Olivia works directly with Advisors to provide ultra-high-net-worth families with comprehensive wealth management solutions.

Olivia joined Gresham as an Associate. Her role involves working directly with Advisors in delivering wealth management services by organizing meetings, monitoring action items, developing customized strategies for clients, collaborating with external experts, and preparing reports.

Prior to joining Gresham, Olivia worked at Morgan Stanley as a Financial Advisor, and before that, was with Performance Trust Capital Partners as an Associate, where she developed balance sheet strategies for community banks and credit unions.

Outside of work, Olivia enjoys exploring the great outdoors with her dog, Grover, seeing local live music, and traveling with her husband, Rhett.



EDUCATION BACKGROUND

B.A., Economics and Anthropology, Loyola University Chicago



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