

Cortnie Lomas Rodriguez

PARTNER, SENIOR VICE PRESIDENT & CHIEF FINANCIAL OFFICER

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Services

Investment Management

Tax Planning and Preparation

Employee Benefits

Estate Planning

Legacy Planning

Retirement Planning

Family Office

Credentials

FINRA Series 66

General Insurance License

Education

Texas Tech University, BS-Personal Financial Planning, 2011

Overview

In her multifaceted role, Cortnie collaborates with advisors and support teams to execute wealth management strategies tailored to clients and their families. She is a trusted leader in crafting and implementing solutions in areas such as insurance, investment strategies, estate planning, and retirement planning.

With more than 15 years of experience in finance and operational management, Cortnie brings significant expertise to her role as CFO. She oversees the firm's financial and accounting operations, including budget and financial planning, financial reporting, accounts receivable and payable, payroll, and financial systems management.

Cortnie joined QuadCap Wealth Management in January 2014. Previously, she honed her advising skills at First Financial Equity Corporation and gained valuable leadership experience managing teams at Bank of America.

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