



hooker & holcombe



## Karin Shepard

Senior Operations Analyst  
Investment Advisory

As Senior Operations Analyst, Karin performs a variety of functions within Hooker & Holcombe's Investment Advisory Group. Working closely with many of our custodial partners, Karin is responsible for client billing, database oversight, managing the quarterly reporting process and overseeing the preparation and production of meeting presentations. She also assists with compliance and audit-related matters. With 15 years of experience in marketing and administration, combined with a passion for process and an attention to detail, Karin helps to ensure that the firm's investment advisory clients receive quality products and timely service.

Karin joined H&H in 2012 as a marketing specialist before moving to the firm's Investment Advisory Group in 2015. Prior to joining the firm, she worked as a marketing senior for Haggett, Longobardi & Associates, LLC where her main focus was reporting and database oversight. She also assisted in the development of specialty service niche markets and coordinated corporate events.

Karin earned an associate degree from Manchester Community College, located in Manchester, Connecticut.