



KELLY BUNTING

PORTFOLIO ACCOUNTING SPECIALIST

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My Net Worthwhile® is ensuring that advisors and clients alike feel confident and comfortable, knowing they are being provided with the most accurate and up-to-date data for their financial accounts.

Kelly is a seasoned professional with over a decade of experience in data aggregation, reconciliation, and validation, specializing in supporting advisors to ensure a seamless client experience. With a background as a portfolio analyst at Schwab and Envestnet, she has managed the data aggregation and reconciliation for over 500 accounts, helping advisors maintain accurate, up-to-date client portfolios. Her responsibilities include auditing databases, facilitating communication between advisors and clients, and utilizing financial platforms to provide accurate data from institutions.

Kelly is passionate about creating solid advisor-client relationships through data accuracy. She believes that when advisors can confidently rely on their data, it strengthens the trust of their clients. Whether resolving issues, running reports, or assisting with data entry, Kelly is dedicated to providing advisors with the tools and resources they need to succeed.

Outside of work, Kelly enjoys outdoor adventures with her husband, Josh, their three children, and two dogs. Whether camping, playing sports, or going on Bigfoot hunts, Kelly cherishes every adventure with her family.