

## KATHY PALUMBO

# ADVOCATE, ADVISOR & FORCE FOR GOOD

Rosati-Kain Academy honors alumna and Oppenheimer Financial Advisor for her lifelong commitment to excellence and empowerment



Kathy Palumbo has spent her life helping others succeed—with grace, purpose, and a deep commitment to service. A trusted financial advisor at Oppenheimer and a proud Rosati-Kain alumna, Kathy has built a career centered on integrity, compassion, and empowering others through education and advocacy.

Before moving into finance, Kathy spent more than 20 years working in nursing after earning her BSN from St. Louis University. That experience shaped her signature approach: listen deeply, plan wisely, and act with compassion. Since 1991, she's guided clients through life's most important financial decisions with a steady hand and a personal touch.

Equally important to Kathy is her role as an educator and advocate. Through Palumbo University, her team's flagship wealth education program, she has built a platform that equips women with the tools, knowledge, and confidence to take charge of their financial futures. For Kathy, financial education is not simply part of her profession—it is an extension of her belief in empowerment and a way to ensure that the next generation of women leaders has the confidence and resources to succeed on their own terms.

Beyond her professional work, Kathy has served as Board President of Catholic Services for Children & Youth, contributed to fiduciary ethics initiatives with the Missouri Bar Association, and remained active with Saint Louis University and its School of Nursing. At Rosati-Kain Academy, she has supported scholarships and endowment initiatives that help ensure future generations of young women receive the same strong, values-driven education that helped shape her own path.

This November, Rosati-Kain honored Kathy with its Legacy Award at the 5th Annual Gala, held alongside the 60-year reunion of the Class of 1965. The award recognized a lifetime of service, leadership, and unwavering dedication to others.

Kathy's journey is a testament to the power of purpose—reflected in the lives she's guided, the opportunities she's created, and the values she continues to uphold. Her recognition celebrates a legacy that will continue to inspire and empower generations to come.



## Q&A with Kathy Palumbo

***You began your career as a nurse before becoming a financial advisor. How did that experience shape your perspective and approach as an advisor today?***

Many people often ask me, “How did you go from nursing to finance?” My answer is always the same—the core of both professions is helping people. As a nurse, the only way I could truly help a patient was by going into their room, meeting them where they were, and asking, “What hurts?” From there, I’d develop a plan of care to help them heal. I’ve carried those same listening and problem-solving skills into my career as a financial advisor. Whether my clients are in St. Louis, New York, California, Dubai, or Singapore, I take the time to meet with them, understand their hopes, needs, wants, and goals, and then design a personalized investment strategy that aligns with their risk tolerance and objectives. Just as I once checked in on patients to monitor their progress, I now stay in regular contact—monthly or quarterly—to ensure my clients remain on track and supported every step of the way.



***Through Palumbo University, you've made it a priority to empower women through financial education. Why is this mission so important to you?***

Over the years, I've realized that many women simply don't have access to the financial information and confidence they need to make informed decisions. Too often, women earn less than men in the same careers, which means they have less to contribute to retirement plans like a 401(k). Even when they do save, they may not fully understand how to invest those funds effectively—often choosing conservative options like money markets that feel safe but don't provide long-term growth. Meanwhile,

men are more likely to diversify their investments across different asset classes, which can lead to stronger returns over time. As a result, when women reach retirement, they may not have accumulated the assets they'll need—especially since women tend to live longer and therefore require more financial resources in their later years. Through Palumbo University, our mission is to close that gap by helping women understand their risk tolerance, evaluate how their assets are structured, and build the confidence to take control of their financial futures.

***Looking ahead, what do you hope to accomplish—for your clients, your community, and the young women you continue to support?***

Looking ahead, my focus is on continuing to generate positive outcomes for the people and communities I serve. Taking care of others has always been at the heart of what I do, and I find great fulfillment in seeing that care reflected through my clients' success, their growth, and the relationships that extend across generations. I'm equally committed to staying connected to a community of women of faith who lead with purpose, and to giving back through scholarships that help young people access opportunity and build confidence in their futures. My hope is that the individuals I work with—whether clients, students, or peers—will carry forward that same spirit of compassion, leadership, and service that continues to inspire me.

**The Palumbo Group  
of Oppenheimer & Co. Inc.**

One North Brentwood Blvd. | St. Louis, MO 63105  
(314) 746-2563 | [oppenheimer.com/palumbogroup](http://oppenheimer.com/palumbogroup)



THE PALUMBO GROUP