Walsh Investment Consulting Group
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Growing the Team, Deepening the Commitment: Welcoming Rose Walsh, CFA, to Walsh Investment Consulting Group

We're thrilled to announce an exciting new chapter at Walsh Investment Consulting Group: the addition of Rose Walsh, CFA, as our newest Portfolio Administrator. Rose brings a wealth of experience, a global perspective, and a deep commitment to client service—making her a perfect fit for our growing team.

This milestone also marks something special: the expansion of Walsh Investment Consulting as a family business. Rose is the daughter of Lou Walsh, CFA, our President. Her arrival not only strengthens our team professionally but also deepens the personal values that have always guided our work—trust, integrity, and long-term partnership.

A Global Perspective, Rooted in Jacksonville
Rose is a Jacksonville native whose career has taken her across borders and industries. After graduating from Notre Dame, she served as a Peace Corps volunteer in Colombia, where she worked on community development and education initiatives. She also spent three years as a technology consultant at Appirio, Inc., helping organizations modernize their systems and workflows.

Most recently, Rose spent five years as an Investment Director at the Alfred I. duPont Charitable Trust, where she focused on private equity, venture capital, and real estate investments. Her experience in institutional portfolio management brings a sophisticated understanding of complex asset classes and long-term strategy—skills she's excited to apply in service of our clients.

"I'm thrilled to join such a thoughtful and experienced team of financial advisors," Rose says. "It's an honor to be part of a group that puts clients first and treats financial advising as a true partnership."

Meet the Team

With Rose's arrival, our team now includes five dedicated professionals:

- **Lou Walsh, CFA** – Financial Advisor with over 30 years of experience. Lou leads the company with a focus on long-term planning, investment strategy, and client relationships.
- **Adri Senecal, CFP** – Vice President and Portfolio Administrator with more than 20 years in the industry. Adri brings deep expertise in compliance and retirement plan management.
- **Jackie Woodson** – A customer service and operations professional with over 40 years in the financial industry. Jackie holds Series 7 and Series 66 Registrations and is known for her exceptional client care.
- **Claire Doyle** – Account Administrator. Claire is Series 7 Registered and plays a key role in client communications and service.
- **Rose Walsh, CFA** – Portfolio Administrator, bringing institutional investment experience and a passion for helping families build financial security.

Our Guiding Principle: Fiduciary Responsibility
With each new team member, we take time to reflect on the values that define our work. One principle stands above the rest: **being great fiduciaries for our clients**.

All three of our advisors—Lou, Adri, and Rose—hold professional designations that require fiduciary responsibility: the CFA (Chartered Financial Analyst) and the CFP (Certified Financial Planner). These credentials aren't just letters after a name—they represent years of study, rigorous ethical standards, and a legal obligation to act in our clients' best interest.

What It Means to Be a Fiduciary
Being a fiduciary means putting our clients first—always. It's a commitment to honesty, transparency, and doing what's right, even when it's hard. Unlike a typical seller-buyer relationship, fiduciary advising often involves giving tough advice: slowing down spending, rethinking risky investments, or saying "no" to the latest financial fad.

Even if it would be easier—or more profitable—to simply agree with every client request, we're bound by our fiduciary duty to offer the best guidance possible. That means helping clients make decisions that serve their long-term goals, not just short-term desires.

We believe that when you choose a financial advisor, you're not just hiring someone to manage your money. You're choosing a **partner**—someone who will walk with you through life's milestones, challenges, and opportunities. That's a responsibility we take seriously.

A Family Business Built on Trust
With Rose joining the team, Walsh Investment Consulting Group becomes not just a company—but a family business. That means our values are personal. We treat our clients like extended family, and we're proud to serve multiple generations with the same care and attention we'd give our own.

Whether you're planning for retirement, saving for college, or building a legacy, we're here to help you make smart, confident decisions. And we'll do it with the integrity and dedication that fiduciary responsibility demands.

Let's Talk

At Walsh Investment Consulting, we're grateful for the trust our clients place in us—and we're excited to continue growing that trust with Rose on board. If you'd like to learn more about our partnership model or how fiduciary advising can benefit your family, give us a call at **904-839-2890**.
