



Lynx Investment Advisory is pleased to announce that Stephen Wintermeier CFP® and Carrie Catlin CFP® will join the team effective April 2026.

They each bring more than 20 years of investment industry experience, and both are CERTIFIED FINANCIAL PLANNER® professionals.

Steve Wintermeier, CFP®

Steve possesses a broad range of global management and financial experience. After receiving his undergraduate degree in International Economics from Georgetown University in Washington, DC, Steve worked as a consultant for the Japanese Ministry of Education in Hamamatsu, Japan. Upon his return to the United States, he earned an MBA from Columbia Business School in New York City. Mr. Wintermeier gained valuable experience in corporate and international business as the Asian Pacific Regional Sales Manager for Titleist and Foot-Joy Worldwide in Fairhaven, MA and Singapore.

After serving as a strategy consultant assisting small and mid-sized businesses, Steve brought his considerable management and planning skills to the financial services industry in 2004 as a financial consultant with A.G. Edwards and Sons. He founded Fenway Financial Advisors in 2006 to provide investors with efficient advice, without incentives to generate commissions.

Steve is the author of *Grand Theft Portfolio*, a book highlighting the need for dramatic changes in the world of personal advice. Steve is a past Vice-President and Treasurer of the Neighborhood Association of the Back Bay in Boston, MA. He is also an active member of the Northern Virginia Model Railroad Club and an honorary member of the South Shore Model Railroad Club in Hingham, MA. In his spare time, Mr. Wintermeier is an active golfer and travel photographer.

Carrie Catlin, CFP®

Carrie brings extensive financial services experience to the firm. Carrie earned an undergraduate degree in Computer Science with a Minor in Economics from the University of Delaware. Following several years as a software developer at IBM, she earned an MBA from the New York University Stern School of Business and embarked on an investment-related career, first as a software developer within a proprietary equity trading team at Morgan Stanley. That led to several years of electronic trading sales at Morgan Stanley in New York and Fidelity Investments in Boston, before relocating to Singapore and joining a sales team at Reuters.

Upon her return to the U.S., Carrie held management positions at Fidelity Investments, Asset Sciences (an early 'robo-advisor') and JPMorgan. Before joining Fenway Financial Advisors in 2015 Carrie was a Senior Relationship Manager with Charles Schwab Advisor Services in Boston.

Carrie is a Social Media Ambassador and former President of the Board of Directors of FORCE (Facing Hereditary Cancer Empowered), a national nonprofit organization devoted to hereditary breast, ovarian and related cancers. She enjoys world travel and has golfed on every continent except Antarctica.