



### Gretchen Wilson

Senior Consultant at Collaborative Solutions Group LLC  
Greater Boston Area


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#### All Consultants are NOT created equal

Gretchen Wilson  
Published on LinkedIn

Just say the word consultant in the financial services industry and some eyes will start to roll. You'll hear things like "I'm tired of consultants", "too high priced" and "t ...see more

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Gretchen replied to a comment

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### Experience



#### Senior Executive Consultant

Collaborative Solutions Group

Jul 2016 – Present · 2 yrs 4 mos  
Greater Boston Area

Collaborative Solutions Group (CSG) is comprised of seasoned C-suite executives who leverage their experience and knowledge while collaborating with broker dealers and RIAs to craft solutions that drive their business forward.

CSG does this by:

- Helping to develop or refine business strategies
- Providing outside perspective and objectivity to navigate business and regulatory changes
- Implementing complex strategic initiatives



### Business Partner

#### Hopsters

Jul 2013 – Present · 5 yrs 4 mos  
Newton MA

Hopsters is Boston's first and only custom craft brewery and restaurant, bringing people together to experiment and create unique craft beers. Hopsters provides all aspects of the brewing process from start to finish - the hops and malt flavor selection, the blend and the ability to create cases of one's own signature brew with custom-designed labels. U... See more



### Senior Consultant

#### BridgePoint Group, LLC

Feb 2014 – Jul 2016 · 2 yrs 6 mos  
Greater Boston Area



### John Hancock Life Insurance Company (U.S.A.)

2 yrs 8 mos

#### AVP, Retirement Plan Operations

Mar 2011 – May 2013 · 2 yrs 3 mos  
Toronto, Canada Area, Boston, MA

- **Head of Intellectual Property, U.S. Division**  
Oct 2010 – Mar 2012 · 1 yr 6 mos  
Boston, MA



### VP, Product Management & Due Diligence

#### John Hancock

Dec 2006 – Oct 2009 · 2 yrs 11 mos  
Boston, MA

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## Education



### Le Moyne College

Bachelor of Science, Business Administration  
1983 – 1987

## Volunteer Experience



### Co-Founder Personal Finance Basics

#### Northeastern University

Sep 2010 – Sep 2010 · 1 mo  
Education

Partnering with the Office of Alumni Relations, co-founded workshop series teaching financial literacy topics to undergraduate students. Topics included Financial Goals, Budgets, Saving, Investing, Debt Management as well as workshops on Networking and Creating a Personal Brand.



### Miles for Miracles Marathon Team

#### Boston Children's Hospital

Feb 2002 – Present · 16 yrs 9 mos  
Children

10 Year member of the Boston Marathon Miles for Miracles team



**Race Director**

Katie Lynch Foundation

May 2010 – May 2013 • 3 yrs 1 mo  
Health

Co-directed Annual Katie Lynch Half Marathon (formerly Heartbreak Hill Half Marathon), 5k and children's race in 2010, 2011, 2012 and 2013.

**Skills & Endorsements**

**Financial Services** · 51



Endorsed by William Dron and 7 others who are highly skilled at this



Endorsed by 2 of Gretchen's colleagues at Collaborative Solutions Group LLC

**Mutual Funds** · 50



Endorsed by Paul Cappuccio, who is highly skilled at this



Endorsed by 2 of Gretchen's colleagues at Collaborative Solutions Group LLC

**Series 63** · 30

Patrick Borden and 29 connections have given endorsements for this skill

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10/2/2018

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