

## Kathleen Sonntag

### Chief Operating Officer (COO)



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**BACKGROUND** • 20 years of experience in the financial and sales sectors

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**SPECIALTY** • Specialist in the broad financial services field, with a degree in accounting

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**EXPERIENCE** • Background in information technology, with a focus on data analysis and use of technology to enable business process improvement

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Kathleen Sonntag serves as Chief Operating Officer at Greenleaf Health. Kathleen's broad career experience spans financial services and the legal profession, with an emphasis on information technology and data analysis. This unique blend brings strong analytical, technical and business skills to her role at Greenleaf.

Before joining Greenleaf Health, Kathleen managed the financial operations of the law firm of Sardo & Batista, P.C., in Newark, NJ. Kathleen oversaw the conversion of a largely manual accounting system into an automated process, resulting in improved business workflow and a significantly better understanding of the firm's financial situation.

From 1997–2009, Kathleen worked at The Capital Group, for the American Funds Distributors. During this time, Kathleen served as a liaison between the Sales and Marketing and Technology business units, translating complex business needs into technology designs. She was instrumental in the development of and strategic planning for key applications in the American Funds' portfolio, including enterprise-wide business intelligence, customer relationship management, and call center technologies. She also performed financial analysis for Sales and Marketing management, providing insights into sales territory restructuring, new product rollouts, and overall business measurement.

Kathleen's additional business experience includes an accounting analyst role at Merrill Lynch.

Kathleen holds Bachelors of Science in Accounting and History from the University of Notre Dame. Kathleen has also completed coursework in Global Affairs at New York University.