

# Geeta K. Brana, CDFA®

## Financial Advisor



**960 Holmdel Road, Building 1,  
Holmdel NJ 07733  
T: 732-546-9315  
E: [Gbrana@FCMAdvisor.com](mailto:Gbrana@FCMAdvisor.com)  
[www.GeetaBrana.com](http://www.GeetaBrana.com)**

Geeta has over twenty-eight years of experience in the International Capital Markets. Her career started in London in 1995 with Lloyds Capital Markets where she trained in all aspects of International finance and credit analysis. She joined Sumitomo Mitsui Banking Corporation in 2000, where she gained extensive experience of structuring and trading debt packages for multinational corporations throughout the United Kingdom, Eastern Europe, US, and Japan.

In 2003, Geeta began her career in the U.S. with Smith Barney's Wealth Management Division, (Citigroup) turning her extensive knowledge to helping individuals. In a primarily male-dominated environment, she was able to build a successful wealth management practice in Washington DC and later New York City working with high-net-worth individuals and institutions.

After a career break while her children were young, Geeta has returned to wealth management through Geeta Brana Wealth, her own boutique independent advisory firm with deep roots in Monmouth County, NJ. Geeta is also the Founder of WHEEL (Women, Helping Educate & Enhance Life), a volunteer organization designed to educate & empower women in transition by providing access to expert advice through networking and educational seminars.

In 2023 Geeta was recognized by NJBIZ, as one of New Jersey's Best 50 Women in Business. Winners were assessed in five categories: Career Accomplishments, Leadership, Vision, Community Service and Mentoring.

Geeta provides comprehensive financial planning services, crafting personalized strategies for retirement, divorce, education, wealth management and more. The mission is to empower families to achieve financial security and peace of mind through holistic financial planning and trusted guidance.