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Nasdaq 2146.04 **-10.78** 5:30pm
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Welcome



As your Financial Advisor, I will spend the time to understand your financial concerns and work in partnership with you to develop a customized investment program that can best meet your needs. As our relationship builds over time, I will be able to anticipate your changing circumstances and help advise you on appropriate investment strategies. I look forward to serving your long-term investment needs. Please feel free to call me at any time.

Business Experience

- **Morgan Stanley Smith Barney***
CHARTERED RETIREMENT PLANNING
COUNSELORSM
CHARTERED RETIREMENT PLANS SPECIALISTSM
Portfolio Manager/Financial Advisor
Baltimore, MD
- **Paine Webber**
Investment Executive
Hunt Valley, MD
- Been in Financial Services Industry Since 1994

Education and Licensing

- Bachelor of Arts
Randolph - Macon College
Ashland, VA
- College of Financial Planning- CHARTERED
RETIREMENT PLANS SPECIALISTSM
- College of Financial Planning-CHARTERED
RETIREMENT PLANNING COUNSELORSM
- Series 63 - Uniform State Exam
- Series 65 - Investment Advisory Agent
- Series 66 - Combined Investment Advisory Agent &
Uniform State Exam
- Life & Health Insurance Licensed
- Series 7 - NYSE/NASD General Securities
Representative

Associations

- Center Club
Member of Wine Committee
Membership Committee
- Baltimore Flowermart Committee Chair
- Annapolis Yacht Club
- National Breast and Ovarian Cancer Coalition
Board of Directors

Honors and Recognitions

- Featured in Baltimore Magazine
"Women in Business"
- Interview in The Daily Record
- Contributing Writer for "SmartWoman" Magazine
Financial Intellect Column
- Speaker at International Business Women Conference
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