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Dow 10318.16 **-14.28** 4:31pm
Nasdaq 2146.04 **-10.78** 5:30pm
S&P 500 1091.38 **-3.52** 5:01pm

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Judith A. McNiff, CFP®

Financial Advisor

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Welcome



My primary focus is working with clients who have undergone a major life event such as death of a spouse, divorce, retirement or career change. As a woman who has experienced several major transitional events, I understand how frightening and chaotic financial uncertainty can be.

My true value comes from being your trusted advisor. We will unravel the complexities of your financial affairs and create a Lifestyle Plan that clarifies and simplifies your financial future. This plan will also reflect your personal values and priorities and be a guide for future financial decisions.

My mission is to help clients gain greater independence over their lives. I provide professional money management and ongoing financial education designed to help clients have more confidence in their ability to make sound financial decisions.

Please see the press release tab for my recent industry recognition.

Honors and Recognitions

- Listed in the 2009 Guide to America's Top Financial Planners

Services

- 529 Plans
- Alternative Investments
- Asset Management
- Estate Planning
- Financial Planning
- Fixed Income
- Professional Portfolio Management
- Lending Services
- Long Term Care Insurance
- Municipal Bonds
- Qualified Plans
- Retirement Planning
- Wealth Management
- Women and Company®
- Education Planning
- 401k Rollovers

Education and Licensing

Business Experience

- Bachelor of Science - 1975
Eastern Illinois University
Charleston, IL
- CERTIFIED FINANCIAL PLANNER™ Certification
- Series 7 - General Securities Representative
- Series 31 - Managed Futures & Commodities
- Series 63 - Uniform State Exam
- Series 65 - Investment Advisory Agent
- Life, Health, Accident & Annuity Insurance Licensed
- **2005 - Present: Morgan Stanley Smith Barney***
Financial Advisor
Deerfield, IL
- **1994 - 2005: Harns Investor Services**
Financial Advisor
Libertyville, IL
- **1990 - 1994: Lasalle Financial Services**
Financial Advisor
Schaumburg, IL

Associations

- Financial Planning Association
- PADS Homeless Shelter
- The Lilac Tree
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