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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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Welcome



I seek to understand my clients broadly and deeply enough to find the opportunities that add value not only to their financial objectives, but also to their life aspirations. I determine what's really important and develop actionable, flexible strategies to help them meet their financial needs. I also design socially responsible investing portfolios for those who want to truly align their values with their investments, while also helping to deliver the financial returns that they desire.

Ask me about Women & Co.®, a program offered by Citi to help women address the unique financial challenges they may face in their lifetimes. Visit www.womenandco.com.

Bulletin Board

- Do questions like these impact your retirement picture: Do I have enough to cover my needs, my dreams and the unexpected? How do today's choices affect others I care about tomorrow? Is there life after work? Call to develop a plan for achieving the retirement you envision.
- I am very appreciative when existing clients introduce friends, family, and business associates for an exploratory meeting. I will do my utmost to meet your highest expectations. Please email a link to my website to anyone in your life that may be facing a life changing event, such as retirement or an estate issue.

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