



As a trusted Certified Financial Planner and financial advisor, I engage

with high net worth clients to reach financial goals and maintain their optimal lifestyles.

The Certified Financial Planner Board of Standards Inc. awards CFP® certification to individuals who meet the board's requirements for professionalism in financial services. To gain certification, a financial advisor must pass the CFP® Certification Examination and the CFP Board's Fitness Standards for Candidates and Registrants, agree to abide by the CFP Board's Code of Ethics and Professional Responsibility and comply with the Financial Planning Practice Standards.

Using a holistic approach, I work with businesses and individual investors to customize individual retirement plans, fund education and create strategic investment plans that include plans for the next generation. This approach includes working cohesively with our clients' CPAs, tax advisors and attorneys.

As an advocate for women, I work with women in transition addressing their needs and design strategies for their next phase of life.

I have been an investment advisor for almost 30 years, with my Calabasas office open for over 10 years.

"I find great satisfaction in seeing clients achieve their lifelong goals as a result of our work together."