



## ABOUT ME

I am a Client Executive working to help companies provide Retirement Benefits and understand the Fiduciary Responsibilities they carry. I am a Wife, Mother, Gramee, Sister, Aunt and Friend. My position provides me with the opportunity to do what I love; help others, meet new people and try to make the work a better experience.

## LIFE PHILOSOPHY

*Strangers are just friends waiting to be made.*

## PROFESSIONAL STRENGTHS



∞ Relationship Building



Loyalty



Dedication



Responsible

Optimistic

## PERSONAL STRENGTHS



Trustworthy



Practical



Compassionate

Adventurous

## WEEK IN THE LIFE



- A** Friends
- B** Family
- C** Oswald
- D** Fun
- E** Laughter
- F** Adventure

## EXPERIENCE

Client Executive

Oswald Financial, Inc.

2021 – present

Senior Client Manager

Oswald Financial, Inc.

2002 – 2021

Regional Retirement Plan Sales Director

Mutual of Omaha

2009 – 2013

Compliance Coordinator, Registered Representative

Planned Financial Services

1995 – 2008

## EDUCATION

Finance

Cuyahoga Community College

## PROUD OF



My Children

My children have become amazing people who make this world a better place.



Starting the N.E. Ohio Women in Pension Network Chapter

Creating a local network of people who work to help each other learn and grow is one of the most impactful things I have ever accomplished.