

Morgan Stanley

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Susan is a financial advisor who is committed to providing sensible advice to help you make informed decisions and achieve your financial goals. Creating a comprehensive customized financial plan designed to withstand the volatility of today's markets and mitigate risk is the foundation of Susan's practice. The process begins with a plan and continues with frequent conversations to discuss progress and changes in your life. The personalized approach is an integral part of her practice.

Her upbringing as the daughter of a military officer exposed Susan to different cultures and countries, including living in Germany and Poland, which greatly influenced her formative years. Upon returning to the USA, she completed her high school education and graduated from Randolph-Macon Woman's College in Virginia. She embarked on her professional journey in the financial industry as an Advisor with Merrill Lynch in Norfolk. She took a break from her career when she moved to Hong Kong and Taiwan with her family. Susan resumed her career as an Advisor with Morgan Stanley after raising her three children in Lake Wales, Florida.

Centered around community service, both locally in Lake Wales and Tampa, as well as on an international scale, Susan's life revolves around servicing others. She currently volunteers with WEDU-PBS of West Central Florida (Trustee), Girl Scouts of West Central Florida (Former Trustee), Episcopal Church of the Good Shepherd, The Vanguard School of Lake Wales (Trustee), and Operation Smile International Medical Services Organization (Medical Services Volunteer).

Susan lives in Lake Wales and enjoys a variety of activities that keep her active and engaged such as tennis, cycling, walking, gardening, swimming, and just about anything that one can do outside. She also practices yoga to help her relax and maintain a sense of balance. Her creative side includes dabbling in different artistic genres, writing and reading to explore new worlds and perspectives along with Photography having her Leica always at the ready to capture moments and record memories. She finds great joy in cooking and baking especially for family and friends. She is always open to try something new and step out of her comfort zone. Planning her next adventure is constantly on her mind. Susan's artwork, "Winter's Eve" is a part of the Maier Museum's permanent art collection, and her first published book, *Tembo, Twiga, and Friends - African Animals* is a children's primer highlighting her photographs while in Kenya on an Operation Smile Medical Mission.

Susan's broad range of life experiences, selfless mindset, and ongoing commitment to professional growth make her an ideal catalyst for connecting with and assisting others. Please contact Susan as she would love to help plan your financial future!

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