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What are you passionate about?

My passion lies in creative solutions. The magic happens in listening to clients' needs, wants, concerns and values and then overlaying that with the composition of their financial house and, just like magic, opportunities scream out at me. Wealth management is so much more than just an asset allocation. It's about using different tools to do things just a little simpler, more tax efficient and the right way. My tax background affords me the foresight into what can go wrong and, more importantly, take advantage of different strategies to help build wealth. The more complex, the more exciting!

What advice would you give young women?

Make sure you are doing something you truly LOVE and have passion for and make sure that you find an environment that accepts you as you are and helps nourish and feed your passion and strengths. When you are starting out in a career, you often see

job interviews as the employer interviewing you, but I challenge young women to make sure they interview the company and the manager. This makes a big difference in your success. Make sure you work for a company/team/manager that will invest in you and help set you up for success. Look for positive energy and managers who inspire you. Don't settle for anything else.

What are you and/or your company doing to stay relevant during these challenging times?

It is in times of crisis that our true value shines and what we do becomes that much more relevant. Our vision is to inspire, educate and prepare our clients to live the lives they want. It is about preparing them for whatever life throws at them. A crisis is a true test of a plan. It is a great opportunity to look at long-term planning with an eye on potential outcomes and take advantage of market downturns for tax planning and enhancing portfolio performance.