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"It is a privilege and a joy to help my clients achieve their investment goals. Understanding their unique goals is important to me. Just as one has a relationship with their doctor, lawyer or contractor, I'm on my clients' life team."

Elizabeth firmly believes that change is inevitable. As we age, our goals alter while our health and living conditions change. Likewise, she believes that the financial environment is no exception, as markets and interest rates move and evolve. Elizabeth enjoys navigating her clients through this change and helping move them closer to their retirement income goals and legacy plans.

Throughout her professional career, Elizabeth has held positions in strategic planning, product development, marketing and national account management. She has 25 years of experience in custom manufacturing. Elizabeth was a vital team member in helping to grow a manufacturing company consistently year-after-year.

In the privately-owned manufacturing sector, she gained diverse expertise as she donned several hats, including finance, product development, sales, marketing, strategic planning, risk/reward, budgeting and benchmarking. In an entrepreneurial atmosphere, surrounded by engineers who developed equipment and product, allowed Elizabeth to learn something new every day and the value of problem solving. Most importantly, Elizabeth developed long-term relationships and subsequently, enjoyed many repeat clients.

It was Elizabeth's brother, Joseph, who encouraged her to earn her Series 7 license. As a financial professional, Elizabeth recognizes the many parallels between what she learned in manufacturing and what she applies in the financial services realm.

Elizabeth observes that much has changed throughout the years, but keeping an eye on the financial health of any company (or, in the case of her role as Financial Advisor, individual) remains prudent.

Elizabeth applies her "whole-of-life" approach, asking atypical and thought-provoking questions, including discussing estates and beneficiaries as most people are not keen on talking about mortality and associated financial matters.

Elizabeth finds that she is specifically helpful to women, relating to them in a personal way. For example, Elizabeth guided a longstanding client as she navigated the death of a spouse, while trying to manage college expenses against an unreliable flow of social security. Elizabeth assessed the situation, helping her client with cash flow management, life insurance and overall guidance. The outcome was that her client reached her goal of raising her son and successfully sending him off to college.

Elizabeth makes it her goal to get to know her clients well; she enjoys developing a relationship, not a transactional association. Elizabeth also makes it her priority to meet family members. She considers her clients friends, and keeps their best interests at the forefront. Elizabeth recognizes that everyone's perspective is not the same, and each client is in a different stage of life. She works to craft a timeline and a financial plan that accommodates the varied needs of her clients.

Elizabeth was raised in New Jersey, but spent 28 years in Illinois, where she raised her now adult children. While in Illinois, Elizabeth maintained a farm, raising chickens and a cow, along with tending to two acres of land that produced enough vegetables for the entire year; she was busy canning and freezing.

A proud empty-nester, Elizabeth returned to her New Jersey roots where she takes pride in her half acre of landscaped beauty, with her very own "she-shed". She enjoys painting and repurposing old furniture, applying her creative thinking into her tiled and jeweled garden stepping stones. Elizabeth also enjoys cooking, entertaining, interior decorating, sewing and art.

Elizabeth holds her Series 7, 63, 65, and health and life insurance licenses. She earned a B.S. in accounting from Southern Illinois University at Carbondale.