

FIVE STAR WEALTH MANAGERS



BEST IN CLIENT SATISFACTION

## LISA M. ROSSI



### Award Winning Independent Advisor with an Entrepreneurial Spirit and a Charitable Heart

- Complete objectivity for my clients, something that may not be available anymore working at a large institution
- Access to a network of experts who can provide specialized guidance and solutions for my clients
- Total wealth management. Solutions with emphasis on creating sustainable lifetime income in retirement

*Specializations: Retirees, Small Business Owners and Corporate Executives*

*Designations: Certified Financial Planning Practitioner, Securities 7, 24, 65, 63; Insurance Life, Disability and Long-Term Care*

For nearly two decades, Lisa has empowered her clients by helping them to make smart choices about their money so they may achieve their goals and keep fulfilling their dreams. Lisa prides herself on investing a lot of time getting to know her clients and more importantly their families to make sure the planning process is set up and managed to meet each client's unique needs.

She makes sophisticated strategies understandable and with this competitive edge, she helps to give her clients a winning advantage not unlike her competitive nature in athletics. (Golf anyone?) An avid sports enthusiast

all her life, Lisa is a competitor, not only for herself but for her clients. It is this champion spirit that has ranked her in the top five percent of financial advisors and in the top one percent of women advisors both at JP Morgan Chase nationally and at her current broker dealer, NPC of America.

However, along with her competitive nature, there is a charitable side - Lisa currently serves as the Fund-raising Chair for a local community club and is an avid donor to children's charities.

To learn more about Lisa, go to [www.lexcowealth.com](http://www.lexcowealth.com).

**LEXCO Wealth Management, Inc. • A Registered Investment Advisor**

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