Carol Q. Bethune

MBA, CFP®

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CERTIFIED FINANCIAL PLANNER™ Professional

"I believe the decisions you make, the money you save, and the opportunities you recognize and exploit contribute more to your financial well-being than anything you or I think might happen in financial markets today, tomorrow, or next year. This is wonderful and empowering because you are in control!"

PROFESSIONAL

Specialties:

- Investment Management
- Retirement Planning
- Retirement Income Planning
- Social Security
- Suddenly Single Women

Education, Certifications & Licenses:

- Bachelor of Arts in English, University of Georgia
- Master of Business Administration, Portland State University
- CERTIFIED FINANCIAL PLANNER™ Professional
- FINRA Series 7 and 66 registrations through LPL Financial
- Life and Health Insurance licenses in Oregon and Washington

PROFILE

Carol's investment management and personal financial planning services help clients develop and implement strategies that work toward creating and preserving financial independence. She primarily works with people approaching or in retirement or experiencing other life changing events, such as divorce or the death of a loved one.

Carol strives to create an atmosphere of openness and trust. She listens to your goals and concerns, explains financial concepts in plain English, mourns your losses and celebrates your successes.

Carol has more than 18 years of experience in the financial services industry. Prior to joining Preisz Financial in 2004, she worked with American Express Financial Advisors, Inc.

Carol was born and raised in Athens, Georgia. She has been married longer than she cares to admit and raised two intelligent, compassionate and money-wise kids. She is an avid reader of literature, history, and science. She also enjoys puzzles of all kinds, gardening, scuba-diving, and playing with her labradoodle Gus.