Adriana Ramos Courts
AIF®

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Financial Advisor

"I am inspired by the connections that I make with our clients every day. In these connections, we are helping people create their paths to financial wellness - which means confidence and clarity about their future. More than money, that is what I feel we actually deliver to our clients."

PROFESSIONAL

Specialties:

- Qualified Retirement Plan Enrollment, Education and Administrative Support
- Individual Retirement Planning and Wealth Management
- College Savings Planning

Education, Certifications & Registrations:

- Bachelors of Arts in Mass Media Communication Studies and Ethnic Studies, University of San Diego
- Accredited Investment Fiduciary® (AIF®)
- State Securities Law Exams
  - Series 66** – *Uniform Combined State Law*
- General Industry Exams
  - SIE* – *Securities Industry Essentials*
  - Series 7* – *General Securities Representatives*
- State Registrations (*held with LPL Financial*) : Oregon, Washington

PROFILE

Adriana comes to Preisz Financial with over twelve years of financial services experience. She comes from a family of educators, and this, along with her professional background, has made her approach to planning about simplicity, education and consistency.

Adriana graduated from the University of San Diego and established her career in retirement planning in 2008 at an independent firm in San Diego. She then took a role with Fidelity Investments and later with Merrill Lynch. Adriana's goal has always been to provide guidance and the tools that clients need to arrive at informed decisions that will help them provide confidence in their financial futures.

Outside of the office, Adriana spends as much time as possible volunteering at her young children's schools and taking them outdoors – enjoying hiking trails, kayaking and biking. She also enjoys the arts and painting as well as creating healthy meal recipes with her husband.

PREISZ FINANCIAL
Your Future...Our Passion

**Registration held with LPL Financial*
***Registration held with LPL Financial and Preisz Financial*