

Bio

Lynn Anne Christensen



Lynn Anne Christensen, a Financial Advisor in the Charleston, SC office, works with individuals preparing for major life events such as retirement or sending a child to college. A detailed roadmap is provided to assist in achieving what is important to you, resulting in peace of mind. The process starts with a thorough review of needs, goals, current financial situation, and tolerance for risk. A well diversified portfolio is created to meet the needs of each client. Continuous monitoring of the client's goals and financial picture as well as the portfolio is the last step in the process.

I also work with non-profits to safely manage their assets. My extensive experience with the operation, conduct, and management of community-based organizations has been instrumental in helping groups strive to meet their goals and objectives.

I am very active in the Charleston community holding several leadership positions with local non-profits. Presently, I serve as President of the Susan G. Komen Breast Cancer Foundation, Lowcountry Affiliate; a Board Member of Charleston Women in International Trade; and hold the office of Vice President for the Zonta Club of Charleston. I've been awarded the "Forty Under 40" award by the *Charleston Regional Business Journal* and participated in the Leadership Charleston program with the Chamber of Commerce. My education includes a Master of Science degree in Public Health from the University of South Carolina and a Bachelor of Arts degree in Psychology from Vanderbilt University. I have been working in the financial services industry since 2001.

Clients can expect:

- **RESPONSIVENESS** - client inquiries and issues will be addressed immediately
- **EDUCATION** - it is vital to understand how and why a portfolio is invested, I will spend time helping clients learn more about money management
- **EXPERTISE** - extensive and ongoing training helps me provide useful and innovative ideas to each client
- **PROACTIVITY**- clients can expect regular contact to capitalize on opportunity and avoid pitfalls before they occur