



Patrice Lancelot

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Experience

Financial Advisor at Preferred Financial Advisors, LLC July 1990 - Present

Clients generally accumulate financial resources, or "financial baggage" over the course of their lives. It is my role to help them coordinate that baggage in order to make informed decisions about their financial future. This coordination helps to ensure that they are in the best position to meet their stated financial goals. I work closely with individuals, couples and families to provide comprehensive, personalized and unbiased professional planning services. My client base remains fairly broad, but I have extensive knowledge and a unique approach to retirement planning.

Financial Advisor at Preferred Financial Group January 2000 - December 2008

Languages

Spanish

French

Skills

Retirement Planning

Mutual Funds

Series 7

Investment Advisory

Strategic Financial Planning

Investments

Asset Management

Retirement

Estate Planning

Fixed Annuities

Asset Allocation

Insurance

Education

The American College

CLU, ChFC, Financial Planning and Services, 1996 - 1997