



## Patrice Lancelot

100 White Spruce Blvd.,  
Ste. U304

Rochester, NY 14623

Phone: 585-427-2420

Fax: 585-427-2452

[Send Me an Email](#)



## Experience

### **Financial Advisor at Preferred Financial Advisors, LLC**

July 1990 - Present (25 Years)

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 (9 years)

## 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