

## Karen J. Lee CFP, CLU, ChFC, MSFS, AEP



Karen J. Lee of Karen Lee and Associates, LLC in Atlanta, Georgia offers financial planning services through her affiliation with Securities America Advisors, Inc. She is a CERTIFIED FINANCIAL PLANNER™ professional and has earned her Chartered Life Underwriter and Chartered Financial Consultant designations. Karen has a Masters of Architecture from Tulane University and a Master's of Science in Financial Services from the American College. She also holds the Accredited Estate Planner designation.

Karen has worked in the financial services industry since 1987. During this time she has worked with hundreds of families, individuals, and small businesses in helping them to achieve their financial dreams. She has the comprehensive education and experience to handle all aspects of a person's financial situation. As evidence of this, Karen holds various licenses and registrations in the areas of insurance, securities, and investment planning.

Karen Lee and Associates is a proud member of Integrated Financial Group, a consortium of independent financial advisors. This elite group of financial planners share their knowledge, tools, and experiences to benefit the clients of the entire consortium.

Karen and her family have lived in the Atlanta area since 1990. In addition to her financial planning practice, Karen enjoys speaking and teaching financial strategies to different groups. Karen is a member of the Financial Planning Association and the National Estate Planning Council. She and her husband, Ken, currently live in Roswell, GA., with their son, Daniel, and daughter, Julia, and many pets. Karen and her family enjoy sailing, boating, running, reading, and all outdoor activities.

Securities offered through Securities America, Inc. Member FINRA/SIPC Karen J. Lee, CFP, CLU, ChFC, MSFS, AEP, Registered Representative Advisory Services offered through Securities America Advisors, Inc. Karen J. Lee, CFP, CLU, ChFC, MSFS, AEP, Financial Planner Karen Lee & Associates, LLC, Integrated Financial Group, Inc., and the Securities America companies are unaffiliated. Karen Lee & Associates, LLC is a member firm of Integrated Financial Group, Inc a consortium of independent financial consultants.

### Areas of Expertise

- Financial Planning
- Retirement Planning
- Psychology of money

### Education/Certification

- M.A., Tulane University, Architecture
- M.A., American College, Financial Services
- CFP®
- CLU
- ChFC

*Karen Lee & Associates, LLC*