Debra L. Morrison, CFP®, MS, AEP

Positive, consistent, meticulous, diligent, compassionate, empathetic, and patient are just a few words that can be used to describe Debra. A fee-only wealth manager for **Trovena, LLC**, Debra has 32+ years' experience in personal financial planning and asset management.

She earned her *Masters of Science in Retirement Planning* and has helped hundreds of clients face and conquer their fears and attain financial security. A **Certified Financial Planner** and **Accredited Estate Planner**, Debra consistently logs more than 3 times her required annual Continuing Education Credits, constantly seeking effective investment and planning strategies that *enhance* her client's net worth while mitigating that four-letter word, **risk**. Her ability to translate complex financial arrangements into understandable terms is unparalleled.

However, what really sets Debra apart has nothing to do with her formidable financial skills. Her clients consistently rave about her *caring and personalized service*, which they say was sorely lacking from big firms.

For example, she completed stock option paperwork and drove to a client's home for his signature to garner him over $18,000 he didn't even know was due him – a World Trade Center Widower, left with the daunting task of raising his children alone.

To say she's intimately involved with her clients' well-being, happiness, and fulfillment in life is an understatement.

These attributes, coupled with her wealth of experience gained from heading her own firm for 14 years, has given her such credibility that **CNN, CNNfn, ABC**, and **MSG's MetroMoney** have all featured her.

She co-anchored **CNNfn**'s hour long live financial call-in show with Stuart Varney & John Metaxas from 1998-2000, and has been widely quoted in

The Wall Street Journal, USA Today, MORE Magazine, Journal of Financial Planning, Garden State Woman Magazine, The Ladies Home Journal, Money, Family Money, America Online's Moneywise, Reader's Digest, and elsewhere.

She is listed in Marquis' **Who's Who in Finance and Industry** & **Who's Who of American Women**, as well as **Nationwide Register's Who's Who in Executives and Business**.

Her expert and empathic pro bono work with **World Trade Center** and **Pentagon** victims' families was lauded by the **Financial Planning Association**.

Debra has developed and presented hundreds of financial empowerment seminars and through Debra L. Morrison Speaks, LLC. She motivates audiences of mature women to address and move through their money fears.

In March 2007 she keynoted for the *Business & Professional Women's Association* for ***International Women's Day*** in Bristol, England, and also spoke at the **2006 New Jersey Governor's Conference for Women** on the importance of Diversified Money Management. Additionally, she spoke on A New Twist on Budgeting at the **2010 New Jersey Governor's Conference for Women**.

Debra has served as the youngest and first woman president of the 500-member **Passaic Bergen Life Underwriters Association**, receiving their Life Underwriter of the Year award in 1982 honoring her for commitment to both the industry and her community.

Other Accomplishments include:-

- In 1984 she was admitted to the prestigious **Registry for Financial Planning Practitioners** as one of fewer than 800 internationally.
- She is a Past President of the **Estate Planner Council of Bergen County** and
- serves on the Finance Committee of the **Kirkridge Retreat Center Board of Directors**.
- An adjunct professor at **Fairleigh Dickinson University**,
- Debra is a member of the **New Jersey Association of Women Business Owners,** the **National Organization for Women**, **Executive Women of NJ** and the **National Association of Professional Women**.

Debra has served on the development committee for both the **Women's Fund of New Jersey** and the **Wayne Chamber Orchestr**a as well as the Board of Directors of the **Philharmonic Orchestra of New Jersey**.

In 2008 she was a member *Mark Victor Hansen's* **MEGA Inner Circle** and *Robert G. Allen's* **Enlightened Wealth Institute** where she joined with other entrepreneurs to **Create Enlightened Wealth for Enlightened Futures** worldwide, working to make a difference in eradicating illiteracy and contributing to micro financing for the world's working poor.

In her spare time, she enjoys golf, tennis, scuba diving, and volunteers for **Special Olympics** and **Habitat for Humanity**.