



Sherrie Le, Financial Advisor

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Languages: English, Vietnamese

I can help:

- Protect your family from the unexpected.
- Build & protect your savings.
- Build your plan for the future.
- Protect your health care options.
- Save for your goals...whatever they may be.

I will work closely with you to fully understand your specific situation and goals. Based on your needs, I'll help you make informed financial choices to build your savings and protect what you save against unexpected events and to prepare financially for the future.

Preparing for an appointment

The most important step in providing clear financial solutions is understanding your needs. When we meet, here's the information we'll need for both you and your spouse:

- Salary or income, investments and insurance amounts
- Pension and registered savings information
- Assets and debts
- Financial information for any business you own

