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Karen joined Allegiant Private Advisors in 2019 as a Senior Operations Specialist. In this role, Karen is responsible for assisting clients with account maintenance, client requests, money movements as well as collaborating with the Wealth Advisor Team on Financial Planning initiatives. Prior to joining the firm, she worked at Merrill Lynch and Suntrust Investment Services as an Investment Associate and most recently as a Client Service Manager at High Tower Advisors. She received her B.A. in Psychology from the State University of New York at Oneonta and holds her CERTIFIED FINANCIAL PLANNER™ certification.



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