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Lisa Spadoni

Financial Planner

CFP®, APMA®, CRPC®, CLTC®, CDFFA®

Lisa's passion for helping her clients strive toward financial security and the independence it affords grew out of stories her father told while she was growing up, of families who had received and quickly spent large sums of money. Her father's stories taught her the importance of making good spending decisions and how good choices can lead to empowerment.

As a result, she loves getting to know people, learning what is important to them and guiding them toward achieving their hopes and dreams. Working primarily with business owners and busy professionals, Lisa enjoys setting them on a path designed to realize their goals and sharing their journey as she monitors their progress and recommends updates as their situations change.

Lisa entered the financial services industry in 2009 after a successful 19-year career in the printing industry. She has a Bachelor of Business Administration in Business degree from the University of Wisconsin-Oshkosh.

When she is not watching her son play football, Lisa gardens, shops farmers' markets, attends book club, takes in a show at the Overture Center with friends, or volunteers. Lisa regularly reads the Journal of Financial Planning, Investment News, In-Business Magazine, Brava Magazine and Real Simple. Along with her husband and son, Lisa also enjoys visiting family in Italy, at Anna Maria Island, Florida and at a lake in central Wisconsin.

AREAS OF FOCUS

Retirement Plans (individual and business), Asset and Wealth Management, Tax Planning, Insurance & Long-Term Care Strategies, Maximizing Family Social Security Benefits and Family Financial Planning

PROFESSIONAL DESIGNATIONS AND ASSOCIATIONS

- » Certified Financial Planner Professional (CFP®)
- » Accredited Portfolio Management Advisor (APMA®)
- » Chartered Retirement Planning Counselor (CRPC®)
- » Certified Long-Term Care Specialist (CLTC®)
- » Certified Divorce Financial Analyst (CDFFA®)
- » Ambassador, Greater Madison Chamber of Commerce
- » Board Member, The Business Forum
- » Member, Financial Planning Association
- » Member, St. Maria Goretti Parish
- » Past Board Member, Madison4Kids



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