

## **NEW FACES ON BOARD AT MARQUEZ PRIVATE WEALTH OF RAYMOND JAMES**

PASADENA, Calif. (December 28, 2020) Marquez Private Wealth of Raymond James is excited to announce Veronica Aguirre, Senior Registered Client Service Associate and Jordan Berry, Financial Advisor as their newest team members.

Veronica brings with her more than 25 years in the financial services industry. Fluent in English and Spanish, she connects with clients on a deeper level, treating each one with respect. She also assists the team in striving to exceed client expectations through responsive service. Trustworthy and reliable, her ability to handle any client request, question or concern with confidence is an asset to the practice.

In her role prior to joining Marquez Private Wealth of Raymond James, Veronica served as a wealth management associate at UBS Financial Services in Los Angeles. Her background also includes client service roles at Morgan Stanley and Smith Barney, where she also spent three years in the options department. She began her career in finance at a young age, finding satisfaction in helping people pursue their goals, and has earned a California insurance license, as well as Series 7, 31 and 66 licenses.

As a financial advisor, Jordan helps clients manage and preserve wealth in pursuit of their objectives. Personable and detail-oriented, he builds strong connections with clients based on mutual respect and trust. In his role, he also focuses on business development and client relationship management. He specializes in serving business-minded and goal-oriented millennials.

He joined Marquez Private Wealth Management in June 2020, drawn by its client-first service and team approach. Before that, he worked with ultra-high-net-worth families in managing real estate acquisitions and liquidations. He understands the level of care required to serve these types of families.

Marquez Private Wealth of Raymond James has more than 20 years of experience in providing tailored wealth counsel for high-net-worth individuals, business owners and professional athletes in financial planning, cash flow management, employee retention, insurance and financing, and exit strategies and wealth transfer. Their team is passionate about advocating for clients best interest and long-term happiness. For more information please visit [www.marquezprivatewealth.com](http://www.marquezprivatewealth.com).



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