Meet Lara Mazek

Specializations:

- Retirement Planning
- Tax Planning
- College Planning
- Estate Planning
- Investment Portfolio and 401(k) Advice & Monitoring
- Social Security
- Medicare
- Insurance & Risk Management

Qualifications:

- CFP® (CERTIFIED FINANCIAL PLANNER™)
- BBA in Finance from Walsh College

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Lara Mazek, CFP®

Lara works closely with individuals and families to create a financial plan for the future, and guides them through each step toward their most important goals. As a financial adviser, she helps her clients overcome both small and large financial challenges in order to live their dreams. She provides wealth management services including retirement and tax planning as well as monitoring investment and 401(k) accounts.

Previously, Lara held roles in accounting and customer service for a large logistics organization. She has earned the CERTIFIED FINANCIAL PLANNER™ designation. Lara graduated from Walsh College with a BBA in Finance.

How do you explain your role to people who are not in the industry?

I help people of all different ages and circumstances determine their

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personal goals as well as make the right financial decisions in order to reach those goals.

What influenced your decision to join Advance Capital?

Before joining Advance Capital, I had a strong desire to work for a company with values, goals and a culture that I could personally stand behind. Soon after speaking with people at the firm, it became clear to me that I had found such a company. Advance Capital has a sincere commitment to put clients' interests first, even if that doesn't result in the most profitable outcome for the firm. These are the types of values make me proud to be a part of the team at Advance Capital.

Describe the importance of client education in your process.

Helping people fully understand their financial situations and the options available to them is one of the best things I can do to help them make good financial decisions and reach their goals. The world of finance can be very complex and confusing, so I make it a priority to explain things in way that can be easily understood. One of my favorite parts of this work is to see the look on a client's face when they have that "aha moment."

What do you find most rewarding about your work?

Many people come to us feeling discouraged about their financial situation and unsure of how to reach their goals. Working hard together to build a well-crafted financial plan and then seeing clients achieve financial success when they thought it was not possible is definitely the most rewarding part of what I do.

What does it take to be successful in your role?

It takes a lot of hard work, a constant desire for learning and, most importantly, a passion for helping people.

Fun Fact!

While people come to Lara for financial peace of mind, her source for tranquility is nature. She is an avid camper who heads out into the woods any chance she gets. And, she would rather listen to the serene sounds of rustling leaves or a rushing stream than music.