



ADVISOR PROFILE

Tracie Karr Financial Advisor

After graduating from USC, Tracie began her finance career in Tulsa for Bank IV, a regional banking leader in Kansas and Oklahoma, which eventually merged with Bank of America in 1999.

She developed her passion for helping individuals and business owners early on. In 2002, to better serve and to help meet the needs of individuals seeking financial advice, she began working for AXA Advisors, a leading provider of insurance and financial services.

She has been in financial services for more than two decades. She obtained her series 7 and 66 registrations and her life and health license in 2002 and has been helping individuals and businesses ever since.

After working at AXA, she realized the importance of providing independent advice to clients and joined the largest independent firm, LPL Financial. Her love for helping people with retirement planning and insurance protection continues to drive her passion every day at WealthPath.

She has vast experience in private wealth, investment management, employer-sponsored benefits, and individual life and health insurance needs. She also received her ACA Exchange Producer license in 2010.

Tracie is an active member and past president of the Fayetteville Newcomers Club. Outside of work, Tracie enjoys spending time with her husband and three children, volunteering, gardening, and horseback riding.

AREAS OF FOCUS:

- Individual and Trust Wealth Management
- Retirement income strategies
- Net worth and cash flow combined with insurance analysis
- Asset and family protection
- Insurance coverage specialist; long-term care; disability; health
- Employer-sponsored health plans and benefits
- Medicare planning

EDUCATION:

University of Southern California
Bachelor of Arts in Psychology

REGISTRATIONS HELD:

- Series 7, 66, Life, Health, Property & Casualty
- Affordable Care Act Producer

CONTACT:

Fayetteville Office
18 E Colt Square Drive
Fayetteville, AR 72701

Phone: 479-845-6220

www.wealthpath.net