Connect with me

Sarin Barsoumian, CFP®, CRPC®

Financial Advisor

sarin.barsoumian@lpl.com

Primary responsibilities: Leading client relationships, providing personalized advice and managing your financial strategy.

Contact me for help with:

-Creating or updating your financial plan
-Formulating and implementing tailored financial advice
-Oversight of investment management, including research and recommendations

Connect with me

Catherine Valega, CFP®, EA

Director of Financial & Tax Planning

catherine.m.valega@lpl.com

Primary responsibilities: Leading client relationships, providing personalized advice and managing your financial strategy.

Contact me for help with:

-Creating or updating your financial plan
-Formulating and implementing tailored financial advice
-Oversight of investment management, including research and recommendations

Know who to contact for your specific needs. We're here to support you every step of the way!

Connect with me

Liana Bekelian

Servicing Advisor

liana.bekelian@lpl.com

Primary responsibilities: Assisting lead advisors, attending client meetings, and ensuring smooth implementation of your financial plan.

Contact me for help with:

-Opening or transferring accounts
-Resolving issues with Account View
-Gathering necessary documents for your financial plan
-Assisting with contribution or distribution requests

Connect with me

Kim Rudge, M.S.Ed

Client Services Associate

kimberly.rudge@lpl.com

Primary responsibilities: Keeping our office running smoothly and efficiently in addition to supporting administrative needs of advisors.

Contact me for help with:

-Client service support
-Updating your contact information
-Scheduling or rescheduling a meeting
-Processing financial planning invoices

Check us out on social!

LINKEDIN

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