

BRINGING IT ALL TOGETHER



UNIFIED WEALTH™
& RETIREMENT PLANNING

Marsha Harris

PRESIDENT, FOUNDER and
INVESTMENT ADVISOR REPRESENTATIVE

Marsha Harris, Founder and President of Unified Wealth & Retirement Planning, has been in the financial services industry since 1999. Marsha brings extensive knowledge and a unique perspective to develop customized services tailored to each client's specific situation and goals. As an Investment Advisor Representative, she is a licensed fiduciary, who works to help her clients realize their retirement dreams.

She is a Qualifying Member of MDRT (Million Dollar Round Table), "The Premier Association of Financial Professionals." Marsha previously served on the Board for the National Association of Insurance and Financial Advisors (NAIFA). She is an A+ Accredited Member of the Better Business Bureau and a member of the National Ethics Association. She volunteers her time to numerous local and national charitable causes that are dear to her, such as the MDA, Share Our Strength and the Special Olympics. She also conducts various educational events for the public throughout the year and has written articles for both local and national publications.

- Licensed life, health, disability and long-term care insurance agent in IN, MI and OH representing numerous carriers.
- Investment Advisor Representative with Brookstone Capital Management, an SEC Registered Investment Advisor.
- Previously held series 6 and 63 as a Registered Representative and currently holds the Series 65 license as an Investment Advisor Representative.



Licenses:

Indiana License #3018660

Ohio License #690067

Michigan License #0227317

AS FEATURED IN



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