



Meet Your Integrated Team

You deserve a dedicated team in your corner, serving as your first call. Whether it's pivotal life events, important family decisions, or routine account updates and investment inquiries, we're here to support you.



Jackie Barber, Client Service Coordinator

703-840-4286 | Jackie.Barber@IFPAdvisor.com

- Schedule a Meeting or Phone Call with Your Advisor
- Other Client Service Requests
- Address, Telephone Number, Email Address Updates
- Not sure who to call? Start with me!



Susan Connolly, Operations Manager

703-883-0887 | Susan.Connolly@IFPAdvisor.com

- Life Insurance or Annuity Questions or Distributions
- Account Transfers
- New Account Opening/Account Maintenance
- Urgent Requests



Lacy LeBlanc, Practice Manager

703-840-4289 | Lacy.LeBlanc@IFPAdvisor.com

- Required Minimum Distribution Requests
- New Account Opening/Account Maintenance
- Account Transfers
- Problem Resolution



Ricardo Almeida, Director of Financial Planning

703-883-0887 | Ricardo.Almeida@IFPAdvisor.com

- Financial Plan Preparation and Updates
- Data Gathering for Financial Plans
- Online Access Set-up and Maintenance
- Service Meeting Preparation

Securities offered through LPL Financial, member FINRA/SIPC. Investment advice offered through Integrated Financial Partners, a registered investment advisor and separate entity from LPL Financial.