



**Sue Perez, C(k)P®, QPFC**  
*First Vice President, Financial Advisor*  
**Wells Fargo Advisor**

Sue is a Financial Advisor with Wells Fargo Advisors, a leading global financial services firm offering a wide variety of investment banking, securities, investment management, retirement planning and wealth management services. Sue is a C(k)P® Certified 401(k) Professional. Sue has earned the C(k)P® Certified 401(k) Professional Designation from The Retirement Advisor University® in collaboration with UCLA Anderson School of Management Executive Education. In addition, she holds a QPFC designation.

Throughout her career in the financial services sector, Sue has earned a reputation for providing clients with honest, professional, wealth-building strategies that have resulted in productive and long-lasting business relationships. Sue understands the dynamics of today's ever-changing regulatory and economic environment. She personally handles all of her client's retirement plans with care and responsibility. She provides on-going support to her plans and focuses constantly on improving plans and providing plan sponsor education. Sue is committed to providing education to plan sponsors as well as plan participants and conducts on-going education for both.

Prior to launching her career as a Financial Advisor, Sue held several executive positions in the residential and commercial lending industry. Throughout her career, she not only managed sales and service efforts but also managed employee training and benefits as well. This experience allows her to assist her plan sponsors with more than just their retirement plan and has allowed her to create successful plan designs that incorporate multiple services and meet multiple needs.



## You have a friend in the retirement plan business. **Meet Dan Graham.**



### **Dan Graham**

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I cover all advisors in the Florida market with a focus on the \$10 million plus retirement marketplace. I have more than 25 years of financial industry experience with Principal Financial Group.

I am Life Insurance licensed in Florida. I also have FINRA Series 7, 26, 63, and 65 registrations.

I received a Bachelor of Science degree in Applied Mathematics from U.S.M.A. in West Point, NY. I live in Tampa with my wife and two sons.