



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 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 the QPFC, Qualified Plan Financial Consultant 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.