

Carina Burtell

As a Financial Advisor with Edward Jones, I understand the value of successfully managing the complexities of personal finances. I work tirelessly to solve my clients' issues and help them create the financial lives they have imagined.

Using an established process, I build personalized financial strategies for my clients that are designed to achieve their unique goals. I take the time to truly listen to my clients and construct measurable objectives tailored to their circumstances. Once the strategies are implemented, I maintain regular contact to address any needs or changes in their situations. To provide a comprehensive service, I regularly collaborate with a team of CPAs, attorneys, and insurance specialists, always respecting confidentiality.

I am proud to serve a variety of clients. I regularly work with multi-generational families to develop strategies of wealth transfer. Many of my clients are business owners, executives, and professionals who are serious about creating wealth and planning for retirement. My clients all share an appreciation for a thorough management of their financial needs. I have been a Financial Advisor with Edward Jones since 2012. Prior to joining the firm, I owned and operated a small business for more than 17 years. My Branch Office Administrator, Carol Lasley, has over 30 years of administrative experience. Together, we are committed to creating an environment of exceptional client service.

Within the community, I am the chair of the Planned Giving Advisory Council for A New Leaf. I am also involved with the Desert Botanical Gardens, The Valley of the Sun United Way, and Midwest Food Bank. In my free time, I enjoy cooking, reading, learning Italian, live jazz, going to the movies, and spending time with my husband, Rich, our son, Cameron, and our three dogs: Pepper, Annabelle, and Winston.

I welcome first time clients and those seeking a second opinion. Contact my office today and learn how my team and I can help.

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