Lisa Detanna

Throughout a noteworthy career in the financial services industry that spans more than 30 years, Lisa has established herself as a knowledgeable guide for family offices, multigenerational families and high-net-worth clients. Getting to the heart of what clients find meaningful is her passion. She works tirelessly to facilitate the often-challenging family conversations around inheritance, estate planning and financial education, striving for a deeper level of harmony and clarity. In support of this purpose, she co-authored a children's book, "Treasures in the Winter Vault," to help teach kids about money, doing the right thing and giving back.

During her tenure at the helm of Global Wealth Solutions Group of Raymond James, which has more than $1.67 billion* in assets under management, she has earned several accolades. Barron's named Lisa to the 2022 Top 100 Financial Advisors and recognized her as one of America's Top 100 Women Advisors (2016-2021) and one of America's Top 1,200 Advisors (2019-2021)*. She was also named to the Financial Times' 2019 list of the Top 400 advisors and has ranked on the Forbes list of Best-In-State Wealth Advisors (2018-2021) and the Forbes list of America's Top Women Wealth Advisors (2020-2021)*. Lisa is also a partner in DH Consulting Group of Raymond James, which has more than $6 billion* in assets under management.

Before joining Raymond James in 2011, she held senior vice president positions at Wedbush, Citi Smith Barney, Morgan Stanley and Imperial Capital (formerly Dabney/Resnick), and began her career at Drexel Burnham Lambert's capital markets group. Her educational background includes an MBA from Pepperdine University and a bachelor's degree in psychology with business emphasis from the University of California, Los Angeles, where she earned a professional financial planning designation. She is an Accredited Investment Fiduciary® and Wealth Management Specialist. Lisa has written and lectured on many financial topics and has been interviewed by CNBC, ABC and NBC and various Los Angeles radio and television stations. In April 2021, she hosted a Barron's in Education interactive session at UCLA.
An early pioneer of the open architecture approach to financial planning and investing that enables objectivity, she incorporates many disciplines in her comprehensive strategies. This includes personal financial planning and cash flow modeling, investment management, insurance planning, estate and gift planning, philanthropy, tax planning, risk management services, family governance and family office services. She views her clients' foundations and endowments as an extension of their families and treats them with care and skill.

Giving to others is a priority for Lisa, and she has taken an active role in community associations in her native Beverly Hills. She is the past president of the Beverly Hills Chamber of Commerce and the Beverly Hills Conference and Visitors Bureau, the past board president of the Westside Family Health Center, a past board member of the Maple Counseling Center, a former national delegate of the International Women's Leadership Association and was recognized by Rotary International as a Paul Harris Fellow. She still finds time in her busy schedule for her membership in the Beverly Hills Rotary Club and the Economic Development Council of Beverly Hills. She currently serves as a board member for Partners for Pediatric Vision and the Westside Family Health Center.