



nerej

McDonald, CFP, joins TFC Financial Management as a senior client advisor

August 10, 2018 - Financial Digest

Debra McDonald,
TFC Financial Management

Boston, MA According to TFC Financial Management, an independent, majority employee-owned registered investment advisory and financial planning firm founded in 1980, Debra McDonald, CFP, has joined the firm as a senior client advisor.

Most recently, McDonald spent 13 years with Wingate Wealth Advisors, as a client counselor/financial advisor. Prior to that, she spent four years with Charles Schwab & Co. working with independent advisors and eight years with Fidelity on the retail and institutional sides.

A member of the Financial Planning Association, McDonald is a CERTIFIED FINANCIAL PLANNERTM professional and holds a BS from Miami University in Oxford, Ohio.

“We are so pleased that Debra is joining our team,” said Renée Kwok, TFC president and CEO. “She shares our values about service excellence and has tremendous experience understanding clients’ needs and helping them achieve their goals.”

New England Real Estate Journal - 17 Accord Park Drive #207, Norwell MA 02061 - (781) 878-4540