



**Vickie McGill, CFP®, PFS**

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Vickie McGill is an insurance planning specialist who serves as a resource to Financial Advisors and their high net worth clients. She will work to understand clients' financial objectives, gather information and provide strategies for the clients to consider for solving complex financial, retirement, and estate issues. Vickie's experience in fiduciary, tax, estate, charitable, retirement, cash flow, and business planning make her a valuable team member.

**Professional Highlights** Vickie began her career in 1986 within the financial services industry, holding various positions in public accounting and wealth planning. She also has an extensive background working with closely-held family businesses. Vickie is experienced in translating complex financial strategies into a language that is readily understandable by clients. She is an experienced and passionate leader of seminars and educational presentations for individuals and groups on a variety of wealth planning topics.

**Previous Experience**

VP and Wealth Strategist – RBC Wealth Management Responsible for assisting Financial Advisors and their clients with retirement and estate strategies in coordination with the clients tax and legal advisors. CFO – Mallory & Church Corp. Responsible for financial reporting and ultimate negotiation leading to the sale of the business.

**Educational Designations/Licenses**

Bachelor of Science degree from Southwest Missouri State University. She holds designations as a Certified Financial Planner® (CFP®), Personal Financial Specialist (PFS), as well as Certified Public Accountant (CPA – Inactive). FINRA Series 7 and 66 securities licenses as well as various state life insurance and long-term care (LTC) licenses.