

Women's Philanthropy Board

ROUNDTABLE SERIES

BIG TIPS AND BIG TRAPS FOR THE ROTH IRA

FEATURING:



Leah Dubberly, CFP, CDFP

THE DUBBERLY GROUP/MERRILL LYNCH



Sandy Coaker, CPA, '85

WILSON PRICE CPAs, MONTGOMERY, AL

In her thirty year career, Leah Dubberly has been a business owner, corporate marketing executive, political action committee fundraiser, and Capitol Hill congressional staffer. Ms. Dubberly joined Merrill Lynch in 1994 with a focus on public speaking and retirement planning education in the community and in large corporations.

In 1999, she completed the two year requirements for a Certified Financial Planner, CFP® certification, and since concentrates on estate planning strategies; concentrated stock strategies for corporate executives; and retirement plans. In 2009, she completed the certification requirements to become a Certified Divorce Financial Analyst, CDFP®. Her team of professionals has over 60 years of combined experience and provides customized wealth management solutions for clients. Leah is business partners with her husband, Chris Dubberly, who develops the investment strategies for their high net worth clients. Chris was recently recognized on Barron's "Top 1,000 Advisors in America: State by State List for 2010".

Sandy Coaker is a 1985 graduate of Auburn University and a Principal with Wilson Price CPAs located in Montgomery, Alabama. Sandy has practiced public accounting for more than twenty-five years, and is a co-chair of Wilson Price's private client services division.

Sandy specializes in providing services for both individuals and privately held companies, with a special emphasis in tax planning and strategy. She also provides business and management consulting services for large, multi-location and multi-state companies, assisting with strategic planning, growth analysis, forecasts, internal reporting and special projects.

In 2009, Sandy co-founded Wilson Price Connections, an initiative focused on the career development of women. The initiative encompasses education, recognition and business development for female professionals, while also promoting interaction through community service projects centered around women's and children's based charities.

FRIDAY, SEPTEMBER 17, 2010 * 12:00 Noon

PRIVATE DINING ROOM * THE HOTEL AT AUBURN UNIVERSITY

\$17 PER PERSON - "DUTCH TREAT"

RESERVATIONS REQUIRED: WPB OFFICE 334-844-3524 or wpbchs1@auburn.edu

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For more information please contact: CHS@AU Women's Philanthropy Board

210 Spidle Hall * Auburn University, AL 36849-5601 * Phone: (334) 844-9199 * E-mail: wpbchs1@auburn.edu * www.humsci.auburn.edu/wpb