

# Women's Philanthropy Board

## ROUNDTABLE SERIES

# REFLECTIONS OF 2010 AND YOUR FINANCIAL FOUNDATIONS FOR 2011

### FEATURING:



**Leah Dubberly, CFP, CDFP**  
THE DUBBERLY GROUP/MERRILL LYNCH



**Susan Moore, JD**  
MOORE WEALTH MANAGEMENT



**Brenda Dozier, Ph.D.**  
BANCORPSOUTH INVESTMENT SERVICES, INC.

FRIDAY, JANUARY 21, 2011 \* 12:00 NOON

PRIVATE DINING ROOM  
THE HOTEL AT AUBURN UNIVERSITY  
ARICCIA RESTAURANT  
\$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

## Leah Dubberly, CFP, CDFA

THE DUBBERLY GROUP/MERRILL LYNCH

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, CDFA®. 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".

## Susan Moore, JD

MOORE WEALTH MANAGEMENT

Susan Clayton Moore has worked as a financial planner and stockbroker for Wall Street Investment firms for over twenty-six years. After obtaining her undergraduate and law degrees from Tulane University, Susan worked as an assistant in-house counsel for Fruit of the Loom before becoming a financial consultant in 1983 with Prudential-Bache Securities in Birmingham, AL.

In 1991, she started her own practice, Moore Wealth Management, Inc. in Alexander City, AL by affiliating with the independent broker-dealer, Raymond James Financial. Fifteen years later she moved her independent broker dealer affiliation to LPL Financial, the largest independent broker dealer in the country.

In the four years Susan has been affiliated with LPL Financial, she qualified for the 2007 Chairman's Club and the 2008, 2009 and 2010 Chairman's Council, reflecting her performance in the top 1% of all LPL advisors.

She currently is a member of the Advisory Board for the Jules Collins Smith Museum of Fine Art of Auburn University and chaired its annual fund-raising event called *Art in Bloom* for its initial three years. Currently, she also is the Program Planning Co-Chair of the Women's Philanthropy Board for Auburn University. Susan has served as the President of Operation Downtown Alexander City and on the boards of Operation Downtown, the Alexander City Jazz Fest, the Alexander City Art Council, the Early Warning Siren Detection Program, the Boys and Girls Club of Alexander City and the Alexander City Kiwanis Club.

## Brenda Dozier, Ph.D.

BANCORPSOUTH INVESTMENT SERVICES, INC.

Dr. Brenda Dozier serves as Vice President and Investment Representative for BancorpSouth Investment Services, Inc. In that position, she serves the general population and customers of the bank in the Opelika Division as well as the Ft. Deposit division. In all, Dr. Dozier has seven banks in her investments territory. Her office is located in the bank branch in Auburn. Prior to joining BancorpSouth Investments, Dr. Dozier was a Wealth Management Associate with First Legacy Partners, LLC.

Before beginning a career in the financial industry, Dr. Dozier served as a Marriage and Family Therapist in private practice. She is an author, a national speaker, a trainer, an expert witness, and she has provided counseling services to individuals, couples and families. As a private practitioner, Dr. Dozier helped individuals and couples develop solutions to a wide range of problems. As a VP and Investment Representative with BancorpSouth, Brenda continues to serve others by offering a comprehensive financial analysis. Dr. Dozier earned her undergraduate degree from The University of Alabama and a master's and doctorate degree from Auburn University. She has one daughter who lives in Birmingham.