Meritrust
Wealth Management

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Marcia Cammack

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Biography

Marcia is a Financial Advisor and Partner at Meritrust Wealth Management. Marcia is a native of Bardstown, Kentucky, and has over 25 years of experience as a CPA/Accountant, with extensive taxation and financial planning knowledge.

Since 1999, Marcia has been able to utilize her accounting and investment knowledge in financial services to develop a realistic, comprehensive plan to work toward your financial goals by addressing financial weakness and building on financial strengths.

Marcia's specialties include:

- Family office management encompassing investment management, wealth transfer, family meetings as well as administrative services
- Personal advisor for divorcees and widow/widowers
- Developing retirement plans for retirees
- Developing education plans for client children
- Personal financial planning and asset management
- Developing strategies for IRA income planning

Education

- University of Louisville, BS in Accounting

Certifications

- Certified Public Accountant

Registrations and Licenses

- Series 7*
- Series 66*
- Life and Health Insurance

For more information about our services, please visit www.meritrustwm.com