

# My Wealth Mgt Bio



## ***Kelly Lawrence, Financial Advisor, Sr. Portfolio Advisor***

Kelly joined Merrill Lynch Wealth Management in 2011 and brings more than 14 years of wealth planning, investment portfolio oversight & risk management strategies. His practice works with successful high net worth families, career transitioning professionals, business owners, & retirees at various life stages. Kelly brings a wealth of knowledge and a true passion for helping client's achieve the lifestyle they deserve. His practice specializes in private financing, investment management, retirement income planning, and tax-control strategies.

Kelly graduated from South Carolina State University with Bachelor of Science in Business Economics. Kelly is an active member of The Harvey Gantt Center, The Arts & Science Council of Charlotte, former board member of Olympic High Academy of Finance, and a volunteer for Charlotte-Mecklenburg Schools. Kelly's FINRA licensed series 7, 6, 63, 66 and is a N.C. Life & Health insurance agent. During his free time Kelly enjoys cheering on his NY Giants, spending time with family, and traveling. Kelly is a resident of Charlotte's - Mallard Creek Area and attends Friendship Missionary Baptist Church regularly.

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