Courtney Breen

Merrill Lynch Wealth Management

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Vice President
Senior Financial Advisor
Senior Portfolio Advisor

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Professional Profile

With a passion for helping individuals and families achieve financial independence, Courtney joined Merrill Lynch Wealth Management in 2017 as an intern before starting full-time in 2018. Her approach to wealth management is rooted in building long-term relationships based on trust, transparency, and a thorough understanding of her clients' goals and values.

Throughout her career, Courtney has successfully guided clients through various life stages, from wealth accumulation and retirement planning to estate preservation and legacy planning. Her focus lies in crafting financial strategies that align with each client's individual goals, whether they are preparing for retirement, funding education, or providing tax minimization strategies. She does this by following a disciplined process that begins with listening to her client's needs to help ensure every strategy is grounded and aligned with their specific goals.

Courtney has a collaborative approach, working closely with clients' attorneys, accountants, providing access to banking specialists, lending officers, and other professionals to provide wealth management solutions. She believes in educating her clients about financial principles and investment strategies, empowering them to make informed decisions about their financial futures.

Courtney has earned Merrill's Senior Portfolio Advisor title and can help clients pursue their objectives by managing on a discretionary basis creating custom investment strategies. She can do so by selecting from a wide range of Merrill model portfolios, third-party investment strategies, ETF's, and mutual funds.

Additionally, she holds the California Life, Accident & Health license, and the Series 7 & 66 FINRA registrations. Courtney graduated from San Diego State University with a degree in Business Administration with an emphasis in Finance.

Outside of work, Courtney enjoys Pilates, discovering new San Diego restaurants, traveling, and spending time with her family. She was born and raised in San Diego and resides in Carlsbad with her boyfriend Chris.
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