

Carol Lupo, CIMA® First Vice President



Contact Carol Lupo

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Not all my friends are clients, but all my clients are friends.

Knowing and understanding my clients' needs drives the relationship beyond those usually shared between professionals and their clients. I am proud to be one of the first people my friends and clients call when they have a concern, whether it is financial or personal. I want to be by their sides as they navigate challenges and to share their happiness when life is good. The goal is for my advice to make a difference in how clients feel about their finances, and in turn how their finances affect their lives.

For more decades than I'd like to admit I've watched the markets struggle and soar, doing it again and again. I am more than acquainted with long-term investing and short-term angst. These experiences have formed my approach to market fluctuations and client advice. Everyone's

plan is custom and personal, just like every relationship.

Professionally, I am very proud of my Certified Investment Management Analyst® certification from the Investments & Wealth Institute in conjunction with the Wharton School of Business. As the founder of the Cherry Hill office of The Princeton Group, I am excited to bring our highly focused service model to southern New Jersey. When not in the office, I am an adoring Loopy to Harlee and Izzy, proud wife to Jon and committed Lion of Judah in the Jewish community.

If you are interested in learning how I work with clients and are wondering if I would be a good fit for you, your family or your company retirement plan, please reach out to me at carol.lupo@theprincetongrp.com or by phone at 856-452-7100.

ABOUT WELLS FARGO ADVISORS FINANCIAL NETWORK

For more than 20 years, Wells Fargo Advisors Financial Network, the independent contractor business model of Wells Fargo Wealth & Investment Management (WIM), has offered financial advisors more control, flexibility, and growth around business ownership as well as support from one of the nation's largest financial institutions. WIM provides financial products and services through various bank and brokerage affiliates of Wells Fargo & Company. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC (WFAFN), a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN.