



LIZZIE ALLEN

INITIATIVE EXECUTIVE ASSISTANT

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My Net Worthwhile[®] is being a resource for clients and team members, making their lives and jobs easier.

Lizzie maximizes advisors' reach through leadership and communication skills, provides administrative support, organizes and coordinates meetings and projects, and maintains professional client relationships. Focused on delivering superior client service, Lizzie excels in proactively enhancing and maintaining client relationships. She thrives on connecting with clients and helping them navigate their financial situations and assists with relieving their stress and concerns. Her expertise extends to leading internal initiatives to improve team performance and client service models.

Lizzie received her BA in Graphic Design and Advertising from the University of Alabama in 2005 and holds a Series 65 professional designation.

Outside of work, Lizzie enjoys tennis, college football (especially Alabama football), spending time with her dogs, yard work, being creative, and reading. She also volunteers with the North Forsyth County Humane Society and Open Hand.