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Li Jean provides a constant bridge between our clients and the information they need to plan their lives and protect their interests. That could mean fielding on-the-spot questions over the phone or researching issues to obtain more information. In addition to having direct client contact on a daily basis, she also supports our planners by providing ongoing account maintenance information and compiling account updates and snapshots for client meetings. Clients of our firm don't just receive the attention of one individual planner. They have the service and resources of an entire integrated team at their disposal.