

Meet Your Integrated Team

You deserve a dedicated team in your corner, serving as your first call. Whether it's pivotal life events, important family decisions, or routine account updates and investment inquiries, we're here to support you.

IFP-Nova Client Services

ClientService@IFPAdvisor.com

Whether you have a question, need assistance, or aren't quite sure where to start, this will be your direct line to our team. No need to track down the right person. We'll make sure your request gets to the right place and is handled promptly.

Jackie Barber, Client Service Coordinator

703-840-4286 | Jackie.Barber@IFPAdvisor.com

- Schedule a Meeting or Phone Call with Your Advisor
- Contact Information Updates
- Other Client Service Requests

Haley Foster, Client Experience Lead

703-840-4295 | Haley.Foster@IFPAdvisor.com

- Required Minimum Distribution Requests
- Urgent Requests
- Problem Resolution
- Client Experience Questions

Susan Connolly, Operations Manager

703-289-0144 | Susan.Connolly@IFPAdvisor.com

- Life Insurance or Annuity Questions/ Distributions
- Account Maintenance
- New Account Opening
- Account Transfers
- Retirement Account Rollovers

Ricardo Almeida, Director of Financial Planning

703-883-0433 | Ricardo.Almeida@IFPAdvisor.com

- Financial Plan Preparation and Updates
- Online Access Set-up and Maintenance
- Data Gathering for Financial Plans
- Service Meeting Preparation

Lacy LeBlanc, Chief of Operations

703-840-4289 | Lacy.LeBlanc@IFPAdvisor.com

- Complex Problem Resolution
- Strategic Business Planning
- Internal Operations and Compliance
- Client Advocacy