

LuAnn Colosimo, CFP[®], CFS

H.D. Vest Financial Services[®]

LuAnn Colosimo is the senior manager of Advisor Recruiting and Communications. LuAnn began her financial services career in 1986 with Fidelity Investments. While there, she earned FINRA securities licenses Series 6, 63, 7 and 8. She worked with clients in customer service and brokerage trading, and then moved into management.

LuAnn joined H.D. Vest in 1991 where she added the insurance license and CFP[®], CFS and CIMC designations. She worked with H.D. Vest Advisors by providing financial planning support, launched a Premium Financial Planning Support department for top producers, served as the Mentor Program manager and then Advisory Services marketing manager.

Her career took her to John Hancock Funds in 1998, where she served as the vice president responsible for wholesaling mutual funds and annuities in the southeastern U.S.

LuAnn re-joined H.D. Vest in 2004 to serve as the manager of Advisor Recruiting. She is responsible for all marketing campaigns to promote H.D. Vest to prospective Advisors and oversees a staff of 16. In 2007, she was given the additional responsibility of overseeing the Communications department that includes a staff of seven and handling all communication with the firm's Advisors.

LuAnn earned a business degree from Central University of Iowa. She is a member of the Financial Planning Association. On a personal note, she is happily married and has one cat and 12 nieces and nephews. When she is not working, she enjoys gardening, hiking, backpacking and motorcycle riding with her husband.



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