

MONIQUE MARSHALL, RMA®, AIF®

President & Founder
Life By Design Investment Advisory Services



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🌐 www.LBDIAS.com



AFFILIATIONS

XY Planning Network Advisor Member
Investments & Wealth Institute Advisor
Member

Financial Planning Association
Advisor Member -2008

Purpose Planning Network

National Association of Insurance &
Financial Advisors

CHARITABLE AFFILIATIONS

Dana Point Women's Club

OC Philharmonic Society

Leading Women's Advisors

BOARDS SERVED

Financial Advisors of America
Chairwoman of the Advisory Council

Olive Crest "Strong Families Safe Kids"
Orange County Trustee, 2012-2014

Kingdom Advisors
Orange County Trustee, 2012-2013

OUTREACHES

Inter-city Youth Outreach Lima, Peru
Co-facilitator of surf camps, 2006 &
2007

Alpha K9 Advocacy for US Veterans
Donor of trained K9

Hurricane Disaster Outreach Katrina &
Gustav

Community organization for volunteers and
resources

DESIGNATIONS & EDUCATION

Retirement Management Advisor® (RMA®)
Investments & Wealth Institute

Accredited Investment Fiduciary® (AIF®)
Fi360 (accredited by the American National Standards Institute
for the AIF® designation)

Investment Management Theory & Practice
Yale School of Management - Present

Certified Private Wealth Advisor® Candidate
Investments & Wealth Institute- Completed 2020

Applied Behavioral Finance Certificate
Investments & Wealth Institute- Completed 2021

Certified Kingdom Advisor® (CKA®)
Kingdom Advisors

FINRA Regulatory Licenses
Passed series 7, 63, 66, 24, 51

CA Licensed Insurance & Long-Term Care Agent
#0B15908 - 30 years

Conflict Resolution and Mediation
Peace Maker Ministries

Intentional Wealth Certificate
How Families Build Legacies of Stewardship and
Financial Health - Investments & Wealth Institute

PUBLIC SPEAKING

Educational Speaking Series

Topics including:

- Advancing Senior Needs & Qualified Care Services
- Understanding Medicare
- Tax Legislation