

# Stoker Ostler

Lee Ann Reitz is an Operations Manager at Stoker Ostler.

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Stoker Ostler is a wealth advisory firm serving more than 600 individuals and families, across the United States and internationally, overseeing more than \$1 billion in assets under management.

Lee Ann plays an integral role in each client's relationship overseeing details that are critical to the management of their investment portfolios. This includes managing our accounting, performance, and reporting systems that deliver account information according to each client's customized communications plan. This reporting system includes summaries of recent and historical account activity, performance appraisals, and tax relevant information that compliment information provided by the custodian of their financial assets. Lee Ann has more than 15 years of experience in the financial industry, having worked for large, national financial institutions as a senior operations professional. Lee Ann joined Stoker Ostler in 2006.

Lee Ann earned a Bachelor's degree in Accounting from Western Michigan University, and a MBA from The University of Arizona.



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Stoker Ostler helps affluent individuals and families reach their financial goals through:

- Financial Planning
- Tax Planning
- Retirement Planning
- Estate Planning
- Portfolio Management

Stoker Ostler is a member of BMO Financial Group [NYSE, TSX: BMO], one of the largest diversified financial service providers in North America.

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