

# Stoker Ostler

Lori Shumway is a Marketing Coordinator at Stoker Ostler.

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.

Lori coordinates the marketing efforts, sales support and relationship management for Stoker Ostler. Lori works closely with the Stoker Ostler team and provides various day-to-day client service activities and prepares customized client proposals and reports. In addition to marketing and sales initiatives, she also heads the planning and coordination of client events and seminars. Lori has been a member of Stoker Ostler since 2013.

Lori has a Bachelor of Arts degree in Elementary Education from Arizona State University and a Master of Arts degree in Educational Leadership from Northern Arizona University.



**Lori Shumway**

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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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