

# News Summary



**ATTENTION:**

**Sara Wacker**

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**YWCA San Diego**

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## CV resident named to Barron's 'America's Top 100 Women Financial Advisors' list

Carmel Valley resident and Merrill Lynch Senior Financial Advisor, Senior Vice President Courtney Liddy was recently recognized on Barron's "America's Top 100 Women Financial Advisors" list in the June 6 issue of Barron's magazine.



**Courtney Liddy**

Liddy was similarly recognized in 2004 as one of the Top 100 Most Exclusive Wealth Advisors in the nation by Worth Magazine.

Her practice includes assisting her clients with concentrated stock strategies, liability management, estate planning, and institutional money management. Liddy has built a dedicated team of professionals to serve the diverse and dynamic needs of high-net-worth individuals, families, foundations, and businesses. She is a national speaker for Merrill Lynch and has appeared on both national and local television and radio programming. Liddy is a Certified Financial Manager and a Chartered Retirement Planning Counselor. She received her

undergraduate degree from the University of Southern California where she studied finance and civil engineering.

Liddy believes in community service. She has been involved in numerous community activities that include the San Diego Economic Development Corporation, the University of California, San Diego Cardiovascular Center; the U.S. Navy League, the Girl Scouts of America, and the San Diego Symphony, and Patrons of the Prado, which supports the local arts, among others. In 2007, Liddy received the YWCA Tribute to Women & Industry award for her leadership in San Diego business. She was named San Diego Woman of the Year in 1996 by the Leukemia Society of America, honoring her charitable efforts to assist children. As the spouse of a Marine reserve officer activated for combat operations during Operation Iraqi Freedom, Liddy received a Congressional Certificate of Appreciation by the Congress of the United States for her support of the Marine Corp Key Volunteer Network, which assists families of deployed service members.