



TRACY S. BURKE, CFP®, ChFC®



INVESTMENT CONSULTANT

tracyburke@conradsiegel.com

Expertise:

- Works with individual clients.
- Specialist in financial planning for families including Retirement, Investment, Risk Management, College Savings and Estate Planning.
- Proficient in assisting individuals develop financial goals and objectives as well as investment selection, and portfolio analysis and monitoring.

Firm Participation:

- Joined **Conrad Siegel Investment Advisors, Inc.** in 2008

Prior Experience:

- Worked in the retirement plan department of a large mutual fund company and as a financial planner for a financial advisory practice.

Educational Background:

- B.M – Music Education/Performance – Ithaca College
- M.M. – Music Performance – University of North Texas

Affiliations/Activities:

- CERTIFIED FINANCIAL PLANNER™ Professional
- Chartered Financial Consultant® Professional
- Investment Adviser Representative of **Conrad Siegel Investment Advisors, Inc.**
- Resident Member of Derry Township Board of Education Policy Committee
- Member of the Financial Planning Association
- Member of the Estate Planning Council of Central Pennsylvania, Inc.