

ABOUT SUSAN LATREMOILLE

CPRC, FEA, ICD.D, MBA



Susan Latremoille is a transformative force in the financial advisory realm, empowering advisors and their firms to elevate client experiences, stand out in a competitive landscape, and cultivate new business opportunities by seamlessly integrating retirement lifestyle planning into their financial strategies.

With an illustrious 38-year tenure as a top-performing financial advisor at industry-leading institutions such as Merrill Lynch, RBC, and Richardson Wealth, Susan brings unparalleled expertise and insight to her work. Her extensive experience has honed her ability to navigate the complexities of wealth management with finesse and foresight.

Susan's dedication to professional development is exemplified by her impressive array of designations, including the ICD.D (Institute of Corporate Directors), FEA (Family Enterprise Advisor), and CPRC (Certified Professional Retirement Coach), alongside her executive MBA. These credentials underscore her commitment to mastering her craft and staying at the forefront of industry trends.

A prolific author, Susan has penned several acclaimed books, including her latest publication, "9 Steps to a RichLife Retirement: Live Well, Give Back, Leave a Legacy." Her literary contributions serve as guiding beacons for advisors and clients alike, offering actionable insights and strategies for achieving financial well-being and legacy preservation.

Susan's influence extends beyond the written word, as evidenced by her exemplary leadership within the wealth management sector and her role as a board member of Richardson Financial Group, where she was honored with the prestigious Hummingbird Award. This recognition speaks volumes about her impact and dedication to excellence.

As a sought-after speaker, Susan captivates audiences with her wealth of knowledge, delivering compelling presentations at esteemed events. Her ability to connect with audiences on a personal level stems from her firsthand experience navigating the challenges and opportunities inherent in financial advisory roles.

Susan's insights have garnered widespread acclaim, earning her media features and interviews with prominent publications and podcasts. Through these platforms, she continues to share her expertise and empower advisors to thrive in an ever-evolving industry landscape.

In essence, Susan Latremoille embodies the epitome of excellence in financial advisory, seamlessly blending practical wisdom, academic rigor, and a genuine passion for helping others achieve their retirement goals.