



MERIDIAN

WEALTH MANAGEMENT, LLC



SUZANNE POWELL

Wealth Management Advisor

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The Villages, Florida

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Lexington, Kentucky

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My Focus is You and Your Next Level

With nearly 25 years of experience in managing finances and designing complex wealth strategies, Suzanne delivers an unparalleled advisory experience —

Built for Clients who Expect Precision, Discretion and Results.

Her clients have built successful lives and careers. They choose to work with Suzanne because she offers more than advice—she offers a tailored strategy, grounded in a deep and thorough understanding of the complexities that come with wealth.

At the heart of Suzanne's practice is her Align & Anchor Process, a framework designed to align wealth with purpose and anchor financial futures with intention. Her process begins with personalized retirement planning, defining spending goals, followed by meticulously crafted asset allocations that budget risk based on objectives. For clients, this means a financial strategy that evolves in real time.

As a fiduciary, Suzanne is committed to the highest standard—acting solely in her clients' best interests. But what truly sets her apart is how she delivers that responsibility: every recommendation is intentional, every plan customized. Financial concepts are explained with clarity, helping clients to make decisions with confidence. Semi-annual reviews are conducted to ensure that every plan remains relevant.

While Suzanne's journey began on a scholarship for computer engineering at Wayne State University - she eventually pivoted to her true passion—finance. She earned her Bachelor of Science in Finance with a concentration in Financial Planning from Southern New Hampshire University.

Suzanne and her husband Chris, reside in Lexington with their children and dogs. She divides her time between their offices in Lexington and Florida. When not collaborating with clients, Suzanne enjoys traveling, cheering at her kids' sporting events, and supporting Arbor Youth Services, a Lexington youth shelter.

Wealth Well Managed, Life Well Lived®

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Advisory services offered through Meridian Wealth Management, LLC, a Registered Investment Advisor. Top RIA Firm: Forbes.com (Awarded Oct 2024)
Data compiled by Shook Research LLC based on time period from 3/31/23-3/31/24.



MERIDIAN

WEALTH MANAGEMENT, LLC

41+ Advisors

A GROWING FIRM

Over 3.9 Billion

ASSETS UNDER MANAGEMENT

48 States

CLIENTS IN



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About Meridian

Meridian serves families, institutional investors, non-profit organizations, and high net worth individuals across many different industries. With over \$3.9 billion in assets under management (as of 12.31.2024), established offices in nine cities, and clients in 48 states, Meridian's goal is to continue to grow across the U.S., adding value to the lives of our clients who share our mission and values.

Technology



Our Services

We can serve as a trusted source of guidance in the following areas:

- ✓ Investment & Portfolio Management
- ✓ Retirement & Financial Planning
- ✓ Risk Mitigation
- ✓ Business Succession Planning
- ✓ Stock Option Planning & Analysis
- ✓ Annuity, Life & Long-Term Care Insurance*
- ✓ Estate Planning
- ✓ Cash Flow & Budgeting Advice
- ✓ Wealth Accumulation
- ✓ Recommendations for Gifted Securities
- ✓ Fiduciary Advisor on Key Business Decisions
- ✓ Retirement Plan Consulting
- ✓ Education Funding

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