



Colleen A. Schon

Senior Vice President, Investments

Colleen Schon focuses on strategic financial planning for her clients in order to help them identify and achieve their long-term financial goals. As a Wealth Management Specialist and Retirement Plan Consultant who has completed the certificate course from Investment Management Consultants Association, Colleen's comprehensive planning process ensures strict adherence to client attitudes and tolerance for risk.

A financial advisor with Raymond James & Associates since 2005, Colleen has extensive experience in the financial services industry, beginning with Merrill Lynch and Co. in 1986. At Merrill, she specialized in insurance and estate planning, working with numerous investment advisors and their clients. In 1993, Colleen partnered with another woman investment advisor, and a year later the tandem moved their practice to PaineWebber. Shortly after her partner retired in 2004, Colleen and her team of financial advisors and sales associates moved to Raymond James. She has long been fascinated by numbers and finance, and enjoys the independent thinking that her current position promotes. Since 2005, she has served on the firm's Women's Advisory Council, which supports and mentors women financial advisors.

Heavily involved in community activities, Colleen has been a soccer player, served as a coach, and volunteers as a recruiter and fundraiser for the annual golf outing of The Alexander Foundation based in Grand Blanc, Michigan. In 2003, she and her husband, David, founded the organization, whose purpose is to provide financial assistance to parents and relatives of children born with Cloverleaf Syndrome and other craniofacial-related conditions. She is also involved in church and other charitable work.

Originally from Flint, Michigan, Colleen and her husband, who have been married since 1980, currently live in Grand Blanc. They have two adult children, a daughter, Casey, and a son, Chad.