



Alisha Reilly

CFP®

Financial Advisor,
LGT Financial Advisors LLC

ABOUT ALISHA

Alisha began working with LGT Financial Advisors LLC in 2010 as the firm's Operations Manager. Focusing her work on women's wealth management, Alisha quickly progressed towards full-time advisor. In 2015 she became a CERTIFIED FINANCIAL PLANNER™, and worked with clients to build practical, holistic financial plans. After taking a brief break in 2018 to tend to her 3 beautiful children, she re-joined the firm in 2021. Alisha brings a vast knowledge base and true client-first experience to the firm. Alisha typically guides business owners and high net worth individuals through a goals-based wealth journey to ensure financial success. On a day-to-day basis Alisha collaborates with other advisors on targeted planning methods, facilitates private placement investment strategies, and provides educational seminars to clients and prospects.

PROFESSIONAL ASSOCIATIONS

Certified Financial Planner Board of Standards – Member
Financial Planning Association (FPA), Dallas/Ft. Worth Chapter – Member



214.461.1437



alishar@lgt-fa.com



www.lgt-fa.com



2626 Howell Street, Suite 700
Dallas, Texas 75204

LICENSED IN

NASD/FINRA – SIE
NASD/FINRA – Series 7
NASD/FINRA – Series 24
NASD/FINRA – Series 66

AREAS OF FOCUS

Personal Financial Planning
Investment Management
Retirement Planning
Generational Estate Planning

ACADEMIC BACKGROUND

Queen's University, Kingston, Ontario, Canada
*Bachelor Degree with Honors in
Psychology*

COMMUNITY INVOLVEMENT

Troop Leader – Girls Scouts Of North
America



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ADVISORS LLC**
Trust. Confidence. Experience

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