

Investment Services

Available through CUSO Financial Services, LP

Monaye Nelson-Morgan

CFS Financial Consultant
858-530-4495
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**CFS Financial
Consultant**

We are pleased to introduce you to Monaye Nelson-Morgan our CFS Financial Consultant, through CUSO Financial Services, LP (CFS). Monaye is a licensed professional, trained to objectively analyze your investment needs and help you create a financial plan designed to meet your unique goals.

Schedule a no-obligation phone appointment with Monaye and gain valuable information on financial planning topics that include:

- 401(k) 403(b) and 457 Rollovers
- Retirement Life Style Strategies
- Creating Income in Retirement
- Life & Long Term Care Insurance
- Small Business Services



CUSO FINANCIAL Member
FINRA/SIPC
An Atria Company

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Monaye

Nelson-Morgan

“As a financial consultant I want to partner with you to create a plan for not only now, but throughout your lifetime. Turning your financial concerns into financial confidence by helping you take the guess out of invest.”

Registered through CUSO Financial Services, LP

Series 7 - Securities Representative

Series 66 - Investment Advisor

CA Life and Health Insurance Lic. #0M04879

Educational Background

B.S. in Economics at Hampton University

Contact Information

Monaye Nelson, CFS Financial Consultant

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