Daphne A. Wright, CPA, CFP®, MSFS

Who I am

Daphne Wright is a CERTIFIED FINANCIAL PLANNER™ professional, Certified Public Accountant, and CFP®, and investment advisor with 22 years of professional experience in the areas of, retirement plan consulting, personal financial planning, and tax. She has extensive experience in corporate and employer sponsored pension plan services. For 18 years she has worked with corporate, education, government, and non-profit employers to provide 401(k), 403(b), and 457 retirement plan services including employee education and individualized plan participant advice. As an investment advisor, she is a separately registered representative of, and offers securities through LPL Financial, member FINRA/SIPC.

What I do

Daphne combines her professional areas of experience to meet the comprehensive needs and set of services required to address the range of issues and concerns involving client's personal finances. In working with individual clients her primary focus is aimed at providing financial guidance to individuals and households; assisting their assessment of goals, resources and planning considerations; and developing a coordinated plan with strategy solutions that appropriately fit their economic objectives. She provides plans that include goal assessment; cash flow and insurance needs analysis; and retirement, college and estate planning. She also is engaged in providing tax advising and planning for individual and small business clients.

She is regularly engaged as a financial educator and requested speaker, and speaks to varied audiences including college and university students, worksite groups, military personnel, and community, business and church forums. As an ardent proponent for financial literacy education, she is active in several financial literacy projects and financial education programs.

How I do it

Daphne helps clients align and prioritize their personal and financial objectives and believes in helping her clients to become more educated about their finances so that they are making informed and effective decisions during every stage of their life.

Daphne earned a Bachelor of Science in Finance from the University of Maryland and Master of Science in Financial Services from the Institute of Business and Finance. She has been a licensed CPA since 1992 and has held the CFP® certification since 2000. She currently holds a position on the Board of Directors for the Association of African American Financial Professionals and is a member of the Financial Planning Association and the Virginia Society of Certified Public Accountants.

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