Lillian M. Peters, CFP®, CDFA®, CTFA

Managing Director, Wealth Management

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Let's Talk
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With more than 20 years of wealth management and financial planning experience and over 15 years leading private wealth divisions, Lillian is a Managing Director of Cherry Bekaert Wealth Management LLC. She provides guidance to high-net-worth individuals, business owners, executives and individuals faced with life events in the creation, implementation and monitoring of their financial plans.

As a Certified Financial Planner™ and a Certified Divorce Financial Analyst®, Lillian leads with objectivity and works collaboratively with her clients to fully understand their needs and priorities. Her engagements involve helping clients address financial impacts for all phases of life, and build strategies to address their wealth accumulation and preservation, retirement planning, estate planning and risk management needs.

Lillian was previously Senior Wealth Director and Managing Director for Fortune 500 companies, leading teams of varied disciplines and expertise including fiduciary, credit, investments, and banking services to high-net-worth individuals, families, private foundations and endowments.

Education

BBA in International Business and Marketing,
Florida International University

Specialties/Areas of Expertise

- Business Owners & Corporate Executives
- Corporate Benefits & Retirement Plans
- Divorce & Life Events Planning
- Estates & Trusts
- Financial Planning & Investment Management
- High-Net-Worth Individuals
- Life, Disability & Long Term Care Insurance
- Multi-Generational & Succession Planning

Professional Involvement

- Certified Trust & Financial Advisor
- The Institute for Divorce Financial Analysts™
- FINRA Series 6, 7, 63, 24, & 26 Investment Licenses
- Life Including Variable Annuity and Health License

Community Involvement

- Board Member, Baptist Health of South Florida Foundation
- Board Member, Florida International University College of Business Dean's Council
- Board Member, The Education Fund, Miami-Dade County

cbhwealth.com

Financial Services

Cherry Bekaert Wealth Management LLC