CLIENT SERVICES PROFILE

Tracy Walls

Client Services Associate

Tracy is usually the pleasant voice you will initially hear when you call the WealthPath Investment Advisors office line. She is also the first person to greet you with a glowing smile when you visit our Rogers office.

Nowadays, the office phone is often forwarded to her mobile, but she keeps the firm available at a touch-tone, will help you with your inquiries and connect you to right people in the firm.

Tracy is originally from Sonoma County in Northern California and moved to Northwest Arkansas in 2007. She previously worked at Generations Bank for seven years before being recruited by one of the firm's partners to join WealthPath in 2020.

Tracy is on our Operations and Client Services Team. She assists in coordinating and organizing multiple calendars, arranging client meetings, and organizing special arrangements.

She completed her bachelor's degree at Sonoma State University and then earned a Master of Arts in Early Childhood Education at Chapman University.

Tracy is the proud mother of four children. She enjoys spending her time with her husband David and the kids, cooking and enjoying family dinners, and relaxing poolside as much as possible.

AREAS OF FOCUS:

- Administrative support services to advisors and partners
- Responsible for assisting Operations and Client Services in day to day managerial oversight
- Client relations related matters for our advisors at WealthPath within the Pensionmark Financial Group

EDUCATION:

Chapman University
Master of Arts in Teaching, Early Childhood Education

Sonoma State University
Bachelor's Degree

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