



## INTENSE CLIENT FOCUS

### Designations and Certifications

Certified Senior Advisor  
Certified Daily Money Manager

### Areas of Special Emphasis

Daily Money Management, Estate Planning,  
Executive Tax Services, Family Office  
Services, Outsourced Services, Payroll,  
Financial Planning, Money and Budget  
Management, Small Business Management,  
Account Organization, Caregiver Services

### Education

Bachelor of Arts in Accounting  
Queens University, Charlotte, NC

Master of Business Administration in HR and  
Master of Science in Adult Education  
Troy University, Montgomery, AL

## SUSAN G. KEY, CSA, CDMM

### Manager | Daily Money Management Services

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Susan Key joined Warren Averett in 2016 and is a Manager and the Service Area Leader of Warren Averett's Daily Money Management Services (DMMS). Her primary role is to meet with clients to create tailored financial budgets and comprehensive service plans to ensure they meet their daily financial goals. As a firm representative, she assists families of private wealth, high-net-worth individuals and busy or retired executives. She is a Certified Daily Money Manager and a Certified Senior Advisor, and she has worked in personal finances with clients for over 15 years. Susan participates in continuing education that emphasizes financial management, Social Security and Medicare changes and updates, as well as ethical business practices and volunteer service specific to Daily Money Management, which helps her effectively meet her clients' financial, health and social needs. Susan is also responsible for the day-to-day operations of Daily Money Management Services and works closely with others in the firm to give the client a well-rounded experience. Prior to joining Warren Averett, Susan worked in a private accounting firm and was a full-charge bookkeeper. She resides in Montgomery, Alabama with her husband and their triplet daughters.

### Professional Affiliations

- Society for Certified Senior Advisors
- American Association of Daily Money Managers

### Community Involvement

- March of Dimes
- Cancer Wellness Foundation
- First United Methodist Church, Member
- Troy Alumni Association, Member
- Leadership Montgomery Class XL

### Ask Me About

- How to simplify your busy life
- Traveling without concern for daily tasks like bill paying
- How we help you find money you did not even know you were missing
- My role as a Daily Money Manager
- Our firm's concierge services
- Why this job is so important to me