

# Alexandra McConnell

FINANCIAL ADVISOR

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## Credentials

Securities Industry Essentials (SIE)

FINRA Series 7

FINRA Series 66

General Lines – Life, Accident, and Health Insurance, TX

## Education

University of Mississippi, BA-Finance, 2023

## Overview

As a Paraplanner, Alex provides essential support to financial advisors by preparing investment and financial planning reports, maintaining client accounts, and ensuring smooth communication with clients.

Working closely with both advisors and clients, she helps deliver timely, accurate client service while supporting the advisor’s overall planning process.

Alex joined QuadCap in 2025 after beginning her career as a Financial Analyst at Goldman Sachs Ayco.