

Mary Harris

SENIOR WEALTH ADVISOR

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Services

Investment Management

Tax Planning and Preparation

Employee Benefits

Estate Planning

Legacy Planning

Retirement Planning

Family Office

Credentials

Series 66

Life and Health Insurance License

Education

University of North Texas,
BBA, 2001

Overview

After several moves around the country, Mary relocated back to the Dallas area and joined QuadCap in 2017. With 25 years' experience in the financial industry, Mary serves as a trusted advisor, committed to helping clients navigate their wealth management needs.

Taking the time to listen to each client's story and understanding their priorities allows Mary and the QuadCap team to design comprehensive financial plans tailored to their individual needs. These plans become the foundation for clients to achieve their financial goals and make informed decisions.

Mary is responsible for ensuring our clients' needs in tax, estate, investment, and retirement planning, as well employee benefits, are met with a high level of quality and service. She finds joy in helping others and demonstrates a passion for building trusted relationships.

Mary began her career in 1999 with Lincoln Financial where she served in many different roles.